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ABSTRACT

These experimental curriculum materials for one of five clusters developed for the occupational orientation program in Illinois include a series of learning activity packages (LAPs) designed to acquaint the student with the wide range of occupational choices available in the business, marketing, and management occupations field. The 31 LAPs, each focusing on a different occupation, are grouped under four categories: (1) General Information, (2) Marketing, (3) Office, and (4) General. Each LAP identifies the category, the focus, the activity, and the objective. It lists the equipment, supplies, and forms needed, states the rationale, and describes the suggested procedure and alternate activities. The activities are designed to give students the opportunity to research, observe, and gain hands-on experience in representative jobs within the career field. This document contains the Student Awareness/Attitude Inventory, and guidelines for developing pre-post assessment tests. Student forms (Resource Person Information Sheet, Field Trip Observation Form, Interview Questions, Observation/Interview Form), and lists of 11 references and of 47 addresses for obtaining resources are appended. (HD)

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ED130115

OCCUPATIONAL ORIENTATION

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

Illinois Office of Education
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U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

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INTRODUCTION

The Business, Marketing and Management Occupations cluster is one of five clusters developed for the occupational orientation program in Illinois. The other four clusters are: Personal and Public Service Occupations; Health Occupations; Industrial Oriented Occupations; and Applied Biological and Agricultural Occupations.

Each cluster consists of a series of learning activity packages (LAPs), teacher references, and career resources. The purpose of the LAPs is to acquaint students with the wide range of occupational choices available within each career cluster field. By participating in the activities, students are given the opportunity to research, observe, and gain hands-on experience in representative jobs within the career field.

Accompanying these cluster materials is the Teacher's Guide to Occupational Orientation. The guide provides an overview of the occupational orientation program in Illinois, suggestions to teachers for implementing a variety of instructional strategies contained in the cluster (field trips, simulations, use of resource persons, and in-class projects), and a Career Exploration Package on interviewing techniques which lays a basic foundation for the learning activity packages within each cluster. It is strongly recommended that teachers use the Teacher's Guide in conjunction with the teaching of the cluster.

Also included in the Teacher's Guide, and duplicated here, are 1) guidelines for developing pre-post assessment tests and 2) a Student Awareness/ Attitude Inventory that can be administered at the beginning of the cluster course.

Guidelines for Developing Pre-Post Assessment Tests

Measuring student knowledge before, during, and after teaching the cluster materials is an important ingredient to the success of the occupational orientation program. Testing allows both the teacher and the student to know what material is going to be covered in one or more LAPs and also to know what material has and has not been learned upon the completion of the activity.

The learning activity packages contained in the cluster materials lend themselves particularly well to this kind of student evaluation. Since an integral part of each LAP is the LAP objective, tests can be developed to measure on a pre-post basis how well each student has mastered the skill or knowledge taught during the activity.

Tests that evaluate students in this way are called criterion-referenced tests. These tests are simply a measure of what the student knows or can do, given the conditions, performance, and

standards stated in the objective. Examples of situations in which pretests and posttests could be used effectively in the teaching of this cluster are:

- before and after a field trip to the local office of the telephone company
- before and after class presentations on advertising and display occupations
- before and after the teaching of a series of LAPs on office occupations
- before and after the teaching of the entire cluster on Business, Marketing and Management Occupations

In each of these situations a pretest serves several useful purposes. Students are given an overview of the kinds of things that will be covered during the lesson or course and what they will be expected to know upon its conclusion. Teachers can discover, by examining the results of the pretests, areas in which students are strongest, as well as areas in which intensive instruction will be required.

By comparing the pretest results with those of the posttest, each student and the teacher learn which skills and knowledge have been mastered or not mastered for a single LAP, a series of related LAPs, or the entire course. Through the evaluation of pre- and posttest results, remediation activities can be planned, courses can be revised, and successful teaching strategies can be identified.

The procedures listed below are given here as an aid in developing tests in the Business, Marketing and Management Occupations cluster. The example given here deals with a single learning activity package; however, these same steps can be used for pre- and posttesting a series of related LAPs or for pre- and posttesting the entire cluster.

The teacher should also consult the series of Pre-Service Occupational Program (POP) Kits available from the Division of Adult, Vocational and Technical Education office in Springfield. Of particular importance are: Kit 3.1, Student Performance Objectives; Kit 3.3, Writing Sets of Objectives; Kit 5.1, Test Item Writing; and Kit 5.2, Student Performance Evaluation.

Develop one or more performance objectives based on a LAP objective. Every learning activity package in the cluster is preceded by a general learning objective, i.e., a statement of what the student should be able to do upon completion of the activity. The specific activity described in LAP 26, for example, is a class discussion with a resource person on data processing jobs. The objective for LAP 26 is: "At the conclusion of this lesson, the student will be able to describe

the job duties, educational requirements, salary ranges, advantages and disadvantages, and any additional information requested for jobs in data processing."

This general learning objective can be broken down into several more specific performance objectives: 1) "Given a list of five job duties, the student will be able to select from the list the three duties which pertain to a given job in the data processing field," 2) Given a list of four educational requirements for jobs, the student will be able to select the educational requirement of a given job in data processing," 3) Given a scale of salary ranges, the student will be able to identify the salary scale for three given jobs in data processing," 4) "Given a randomized list of 10 advantages and 10 disadvantages of a given job in data processing, the student will be able to identify eight of 10 advantages and eight of 10 disadvantages."

Notice that for each of the performance objectives, three components were presented: the conditions ("given a list" or "given a scale"), the performance required of the student ("will be able to select from the list the three duties...") and the standard of performance required (selecting three duties from a list of five). A well-written performance objective always contains these three components stated in concrete, measurable terms.

Rank the performance objectives by importance. Before writing test items, the relative importance of each of the performance objectives should be decided. For a single learning activity package this decision is usually not too difficult to make. In LAP 26, for example, you may see that the performance objective dealing with the job duties of several given jobs in data processing is the most important, while the other three objectives are of lesser importance. When you are trying to decide the importance of 20 or 30 performance objectives for a series of 10 learning activity packages, this task may be more difficult. However, the time will be well spent since such pre-instruction decisions on a series of LAPs will assist planning for teaching skills and knowledge most important for students to learn.

Decide how much testing time is available or desirable. Since the amount of testing time determines, in large part, the length of the test, you must decide how much time is available or desirable for testing. Testing time could range from a short 5- to 10-minute period for a pretest before a telephone company service representative comes to speak to the class to a 30- or 40-minute period for a posttest following instruction on the 13 LAPs on marketing occupations. When you have decided the amount of testing time, you should be able to estimate the number of test items to be written.

Develop one or more test items to measure each performance objective. The first consideration is the number of test items to be designed for each objective. Having decided, for example, that the tasks for given jobs in data processing are the most improtant aspect of LAP 26, you will probably want to write a large proportion of the test items to measure that performance objective. A second consideration is the type or format of test item to select. For ease of administration and evaluation of results, it is advised that group-administerable, multiple-choice items be used. Written responses to questions or individually administered items are much more difficult to score and evaluate and require an excessive amount of testing time.

Administering the Student Awareness/Attitude Inventory

The student awareness/attitude inventory on the following pages should be given before instruction begins on any of the learning activity packages in the cluster. Two purposes are served by the inventory: 1) it can be used by the teacher to generate a general class discussion about careers and to establish a positive climate for occupational exploration in the Business, Marketing and Management field, and 2) it can serve as the basis for a personal career discussion between the student and his or her guidance counselor. Items 1-60 are specifically designed for general class discussion purposes and Items 61-102 are designed for career guidance discussions.

Through the combination of this inventory, other guidance activities, the cluster's learning activity packages, and the Career Exploration Package (see Teacher's Guide), it is hoped that the student will take responsibility for establishing his or her own career goals. The discussions which result from the administration of the inventory provide a useful starting point for identifying both awareness and attitudes in the occupational orientation program.

STUDENT AWARENESS/ATTITUDE INVENTORY

Name: _____

Directions: Listed below are a number of statements about work and choosing an occupation. Read each statement and decide whether you agree or disagree with it. Your answer should be as close as possible to what your true opinion is right now. There are no right or wrong answers. If you STRONGLY AGREE with the statement, circle SA; if you AGREE with the statement, circle A; if you are UNDECIDED, circle U; if you DISAGREE with the statement, circle D; and if you STRONGLY DISAGREE circle SD.

1.	You have to know what you do well, and what you do not do well before you can choose an occupation.	SA	A	U	D	SD
2.	Ask others about their occupations, but make your own choice.	SA	A	U	D	SD
3.	It's unwise to choose an occupation until you have given it a lot of thought.	SA	A	U	D	SD
4.	Once you make an occupational choice, you can't make another one.	SA	A	U	D	SD
5.	In making an occupational choice, you need to know what kind of person you are.	SA	A	U	D	SD
6.	A person can do anything he or she wants as long as he or she tries hard.	SA	A	U	D	SD
7.	Your occupation is important because it determines how much you can earn.	SA	A	U	D	SD
8.	In choosing an occupation, it is more important to know what you do well than to know what you like to do.	SA	A	U	D	SD
9.	Plans which are indefinite now will become much clearer in the future.	SA	A	U	D	SD
10.	Your parents probably know better than anybody which occupation you should enter.	SA	A	U	D	SD
11.	Work is worthwhile mainly because it lets you buy the things you want.	SA	A	U	D	SD
12.	Work is drudgery.	SA	A	U	D	SD
13.	A person should not even try to decide upon an occupation because the future is so uncertain.	SA	A	U	D	SD
14.	It's probably just as easy to be successful in one occupation as it is in another.	SA	A	U	D	SD
15.	By the time you are 15 years old, you should have your mind pretty well made up about the occupation you intend to enter.	SA	A	U	D	SD

16.	There are so many things to consider in choosing an occupation, it is hard to make a decision.	SA	A	U	D	SD
17.	Sometimes you can't get into the occupation you want to enter.	SA	A	U	D	SD
18.	You can't go very far wrong by following your parent's advise about which occupation to enter.	SA	A	U	D	SD
19.	Working in an occupation is a lot like going to school.	SA	A	U	D	SD
20.	The best thing to do is to try out several occupations and then choose the one you like best.	SA	A	U	D	SD
21.	There is only one occupation for each individual.	SA	A	U	D	SD
22.	The most important consideration in choosing an occupation is whether or not you like it.	SA	A	U	D	SD
23.	Your interest in an occupation is not as important as whether you can do the work.	SA	A	U	D	SD
24.	You get into an occupation mostly by chance.	SA	A	U	D	SD
25.	It's who you know, not what you know, that's important in an occupation.	SA	A	U	D	SD
26.	You should choose an occupation which gives you a chance to help others.	SA	A	U	D	SD
27.	You should choose an occupation, then plan how to enter it.	SA	A	U	D	SD
28.	You should choose an occupation in which you can someday become famous.	SA	A	U	D	SD
29.	If you have some doubts about what you want to do, ask your parents or friends for advice and suggestions.	SA	A	U	D	SD
30.	Choose an occupation which allows you to do what you believe in.	SA	A	U	D	SD
31.	The most important part of work is the pleasure which comes from doing it.	SA	A	U	D	SD
32.	It doesn't matter which occupation you choose as long as it pays well.	SA	A	U	D	SD
33.	As far as choosing an occupation is concerned, something will come along sooner or later.	SA	A	U	D	SD
34.	I don't worry about choosing an occupation because I don't have anything to say about it anyway.	SA	A	U	D	SD
35.	The best occupation is one which is interesting.	SA	A	U	D	SD
36.	I really can't find any occupation that has much appeal to me.	SA	A	U	D	SD
37.	I have little or no idea of what working will be like.	SA	A	U	D	SD
38.	When I am trying to study, I often find myself daydreaming about what it will be like when I start working.	SA	A	U	D	SD

39.	If I go into the military, I think I'll wait to choose an occupation until I'm out.	SA	A	U	D	SD
40.	When it comes to choosing an occupation, I'll make up my own mind.	SA	A	U	D	SD
41.	I want to really accomplish something in my work—to make a great discovery or earn lots of money or help a great number of people.	SA	A	U	D	SD
42.	As long as I can remember, I've known what job I wanted to do.	SA	A	U	D	SD
43.	I can't understand how some people can be so set about what job they want to do.	SA	A	U	D	SD
44.	My occupation will have to be one which has short hours and nice working conditions.	SA	A	U	D	SD
45.	The occupation I choose has to give me plenty of freedom to do what I want.	SA	A	U	D	SD
46.	I want an occupation which pays a lot of money.	SA	A	U	D	SD
47.	I often wonder how successful I'll be in my occupation.	SA	A	U	D	SD
48.	I know which occupation I want to enter, but I have difficulty in preparing myself for it.	SA	A	U	D	SD
49.	I know very little about the requirements of occupations.	SA	A	U	D	SD
50.	I want to continue my schooling, but I don't know what courses to take or which occupations to choose.	SA	A	U	D	SD
51.	I spent a lot of time wishing I could do work that I know I cannot ever possibly do.	SA	A	U	D	SD
52.	I'm not going to worry about choosing an occupation until I'm out of school.	SA	A	U	D	SD
53.	If I can just help others in my work, I'll be happy.	SA	A	U	D	SD
54.	I guess everybody has to go to work sooner or later, but I don't look forward to it.	SA	A	U	D	SD
55.	I often daydream about what I want to be, but I really don't have an occupational choice.	SA	A	U	D	SD
56.	The greatest appeal of an occupation to me is the opportunity it provides for getting ahead.	SA	A	U	D	SD
57.	Everyone seems to tell me something different—until now I don't know which occupation to choose.	SA	A	U	D	SD
58.	I have a pretty good idea of the occupation I want to enter, but I don't know how to go about it.	SA	A	U	D	SD
59.	I plan to follow the occupation my parents suggest.	SA	A	U	D	SD
60.	I seldom think about the occupation I want to enter.	SA	A	U	D	SD

61.	A college degree is necessary for the kind of work I want to do.	SA	A	U	D	SD
62.	My father wants me to go to college.	SA	A	U	D	SD
63.	My mother wants me to go to college.	SA	A	U	D	SD
64.	I would be able to earn more money as a college graduate.	SA	A	U	D	SD
65.	I want to learn more about the careers I might enter.	SA	A	U	D	SD
66.	Marriage will help advance my career.	SA	A	U	D	SD
67.	I enjoy learning.	SA	A	U	D	SD
68.	My teachers think that I should go to college.	SA	A	U	D	SD
69.	I feel athletics should be an important part of my education.	SA	A	U	D	SD
70.	I'm influenced by many of my friends who are going to college.	SA	A	U	D	SD
71.	Social activities are very important to my career goals.	SA	A	U	D	SD
72.	I want to make good personal contacts for business or an occupation.	SA	A	U	D	SD
73.	A college education would not help me to do the things I am most interested in.	SA	A	U	D	SD
74.	I want to get a job and start earning a living as soon as possible.	SA	A	U	D	SD
75.	I need to start earning a living in order to support myself immediately.	SA	A	U	D	SD
76.	Continuing my formal education after high school would cost more than my parents could afford.	SA	A	U	D	SD
77.	Continuing my formal education after high school would cost more than my parents are willing to pay.	SA	A	U	D	SD
78.	My high school grades are too low to continue my education after high school.	SA	A	U	D	SD
79.	I don't like to study.	SA	A	U	D	SD
80.	I don't think I have the ability to continue my education after high school.	SA	A	U	D	SD
81.	It would cost more than it is worth to me to continue my education after high school.	SA	A	U	D	SD
82.	Earning a good income is important to me.	SA	A	U	D	SD
83.	Having job security and permanence is important to me.	SA	A	U	D	SD
84.	The work that I do should be important.	SA	A	U	D	SD
85.	I want the freedom to make my own decisions in my job.	SA	A	U	D	SD

86. In my job I should have the opportunity for promotion and advancement. SA A U D SD

87. Meeting and working with sociable, friendly people is important to me. SA A U D SD

88. If I could get better pay at another place, I would change jobs. SA A U D SD

89. If the work was not interesting enough, I would change jobs. SA A U D SD

90. If I could do more important work elsewhere, I would change jobs. SA A U D SD

91. If I had a poor supervisor, I would change jobs. SA A U D SD

92. If I didn't like my co-workers, I would change jobs. SA A U D SD

93. If I did not receive expected promotions or salary increases, I would change jobs. SA A U D SD

Directions: Read each question and circle the letter that answers the question for you.

94. Do you think you will quit high school before you graduate?
   A. I will definitely leave.
   B. I am likely to leave.
   C. I don't know.
   D. I am likely to stay.
   E. I will definitely stay.

95. After you graduate from high school, what do you plan to do?
   A. I will get a job.
   B. I will go to vocational, technical, or business school.
   C. I will go to junior college.
   D. I will go to college.
   E. I don't know.

96. If you go to college when do you plan to start?
   A. right after high school.
   B. after completing military service.
   C. after I have worked for a few years.
   D. my plans are not definite.
   E. I definitely do not plan to attend college.

97. How much education do your parents or guardians want you to have?
   A. They don't care whether I stay in school.
   B. high school only
   C. vocational school, business school, or junior college
   D. college degree
   E. I don't know.

98. How much education are most of your friends planning to obtain?

A. They are planning to quit high school.
B. They are planning to complete only high school.
C. They are planning to obtain vocational school, business school, or junior college training.
D. They are planning to obtain four-year college training.
E. I don't know.

99. How many different occupations have you seriously considered entering?

A. none
B. one
C. two
D. three
E. four or more

100. How definite is your present choice of an occupation?

A. I have made a definite choice.
B. I have made a likely choice.
C. I am undecided about my future occupation.

101. What grade were you in when you decided upon your present choice of an occupation?

A. I have not decided upon an occupation.
B. sixth grade or earlier
C. seventh or eighth grade
D. ninth grade
E. tenth grade

102. What three jobs would you like to have someday? Write your first, second, and third choice below.

_____

_____

_____

LEARNING ACTIVITY PACKAGE 1

Category: General Information

Focus: Introduction to Career Report

Activity: Written Report

Objective: At the conclusion of this lesson, the student will have selected a specific business, marketing and management job to research in preparation to the writing of a report.

EQUIPMENT, SUPPLIES, AND FORMS

1. Job titles list for Business, Marketing and Management (see sample enclosed in this learning package).
2. Career Report Format (see sample enclosed in this learning package).
3. Career Report (see sample enclosed in this learning package).
4. Career Word Game (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to introduce students to the written report. This report will give the students an opportunity to research a business career of their choice in some depth.

SUGGESTED PROCEDURE

Students are to select an occupation from the business, marketing and management area which may be, or is, their career goal.

To help decide on a career goal in the business, marketing and management cluster, students might ask themselves the following question: "What occupation in business would I enjoy doing the most?"

The question will help students think not just in terms of entry-level occupations but also in terms of a satisfying and rewarding occupation which serves as an attainable career goal. Students are to prepare a written report about their career choice using the sample format given below.

Discuss with the students the report that is expected from each of them.

A list of job titles for business, marketing and management, the sample report format, a sample career report, and a sample career word game are presented on the following pages. The students should select a job from this list, or they may have another job title that you may wish to approve for their investigation. You may wish to briefly discuss each job before asking the students to make a selection.

JOB TITLES IN BUSINESS, MARKETING AND MANAGEMENT

1. Accountant
2. Actuary
3. Advertising Worker
4. Apartment Manager
5. Appraiser
6. Bank Clerk
7. Bank Officer
8. Bookkeeping Worker
9. Branch Manager
10. Broker
11. Buyer
12. Card Tape-Convertor Operator
13. Cashier
14. Claim Adjuster
15. Claim Examiner
16. Correspondence Clerk
17. Court Reporter
18. Credit Official
19. Demonstrator
20. Electronic Computer Operator
21. Fashion Coordinator
22. Field Representative
23. File Clerk
24. Industrial Traffic Manager
25. Marketing Research Worker
26. Merchandise Manager
27. Office Machine Operator
28. Office Manager
29. Office Supervisor
30. Personnel Worker
31. Programmer
32. Public Relations Worker
33. Purchasing Agent
34. Real Estate Agent
35. Receptionist
36. Salesperson
37. Sales Correspondent
38. Sales Manager
39. Shipping and Receiving Clerk
40. Station Manager
41. Statistical Clerk
42. Stenographer and Secretary
43. Stock Clerk
44. Store Manager
45. Supervisor, Computer Operations
46. Systems Analyst
47. Telephone Operator
48. Teller
49. Terminal Manager
50. Title Insurance and Abstract Clerk
51. Traffic Clerk
52. Transcribing Machine Operator
53. Typist
54. Underwriter
55. Word Processing Clerk

SAMPLE

CAREER REPORT FORMAT

Cluster: Business, Marketing and Management Occupations

Occupation: Office

Job Title: Actuary

1. Definition:
2. History:
3. Nature of work:
4. Requirements:
5. Opportunities for experience or exploration:
6. Method of entering:
7. Advancement opportunities:
8. Employment outlook:
9. Earnings:
10. Conditions of work:
11. Related jobs:
12. Advanced educational training:

References

1. Encyclopedia of Careers, Volume 2.
2. Occupational Outlook Handbook, 1974-75 Edition.
3. The Actuarial Profession.
4. Acturarial Science Mathematics in Action (Pamphlets)
5. Informative papers given to me by a person currently employed as an actuary.

Other

Collect pamphlet and forms about the job.
Make up games using words from the occupation: crossword puzzles, hide-the-word games, etc.

SAMPLE

CAREER REPORT

ACTUARY

1. Definition: An actuary is a professionally trained executive who deals with statistical, mathematical, and financial calculations. He/she applies this knowledge to the solution of problems in the life insurance industry and related fields.

2. History: The word "actuary" was first used in 1762 when the charter was written for the Equitable Society of London, the first life insurance company to use scientific information in figuring premiums. The starting of actuarial work began in the early 18th century when Blaise Pascal and Pierre De Fermat arrived at an important method of calculating actuarial probabilities, beginning what is now known as the science of probability.

   The first mortality table was compiled in the late 1600s when Edmund Halley discovered the excess of male over female births. Halley, an astronomer (he discovered Halley's Comet) was called the founder of life insurance because of his study in this field.

   The actuary was finally officially recognized in 1821 as a profession. However, a real need for actuaries was not felt until 1860, when more detailed insurance forms began to be used.

   In 1888, the Actuarial Society of America was formed. Seven years later, this society issued a series of exams to use as tests for membership. Some forms of those examinations are still used today.

   The first actuaries were mainly concerned with statistics and financial calculations. Now actuaries deal with many more and complex problems because of a bigger world. They work with investments, and taxation, develop policy forms and premiums, and perform many other duties.

3. Nature of Work: An actuary does many things. He/she analyzes, designs, evaluates, assembles, calculates, plans and makes decisions. He/she is basically a mathematician. His/her job is to keep the company out of financial danger. He/she designs the insurance or pension plans. He/she develops and evaluates mortality tables on a certain person. Then he/she determines the rate of insurance for that person. He/she tries to forecast probabilities of costs, should something happen that requires insurance coverage.

4. Requirements: To enter into the actuarial field a person usually needs a bachelor's degree with a major in statistics or business administration. A thorough knowledge of calculus, probability, and statistics is extremely helpful. Other courses needed are insurance law, economics, accounting, English composition, literature

various natural and social sciences, and possibly a foreign language.

A person must be able to assume responsibility and be able to develop an interest in many things, since he/she comes in contact with nearly every subject.

It takes an actuary five to 10 years to reach full professional status. The reason is that he/she must take a series of 10 exams and pass them. If he/she doesn't pass one, he/she takes it over and over until he/she does pass. The exams consist of general mathematics, specialized actuarial math, and all phases of the insurance business.

An actuary receives on-the-job training.

A student interested in becoming an actuary should take as much mathematics as possible.

5. Opportunities for experience: A person cannot be an actuary in school unless he/she takes the first exam in the second or third year of college and passes it. Then he/she will be eligible for the job.

6. Method of entering: A person may take the beginning exams while in college. If he/she passes, he/she can apply for or be offered a job. He/she is immediately "in," and receives on-the-job training. After a while, he/she takes the second exam and so on.

7. Advancement opportunities: Advancement depends solely on the person. There are a lot of "ifs" involved. If he/she passes the exams, if he/she shows responsibility, if his/her performance is acceptable, there is no limit on advancement. Actuaries also qualify for underwriting, accounting, or investments.

8. Employment outlook: Job opportunities should be favorable because there is currently a shortage of actuaries. As of now there are around 3,400 employed in the U.S.

9. Earnings:

	LOW	HIGH	AVERAGE
Student	$ 9,300	$ 13,400	$ 11,300
Associate	15,000	22,000	18,200
Fellow	23,500	35,000	25,500

10. Conditiions of work: Conditions are usually very good. You work in a building, in an office atmosphere. There is no physical danger at all.

11. Related jobs: Underwriter, accountant.

12. Advanced educational training: All you have to do is get your bachelor's degree in mathematics or business administration. Then you take the exams. There are no business schools or special colleges for actuaries.

SAMPLE

CAREER WORD GAME

Instructions: See how many words you can make out of the word: actuaries

1.	act	18.	tie	35.	raise
2.	tar	19.	sea	36.	cart
3.	sat	20.	use	37.	cute
4.	star	21.	car	38.	acute
5.	sear	22.	rise	39.	cut
6.	ear	23.	tires	40.	ace
7.	at	24.	ire	41.	rear
8.	rats	25.	cat	42.	nut
9.	tries	26.	ate	43.	true
10.	cries	27.	rate	44.	cue
11.	stare	28.	crate	45.	seat
12.	stairs	29.	stir	46.	cruise
13.	tear	30.	cure	47.	sire
14.	aries	31.	sir	48.	cur
15.	are	32.	arise	49.	it
16.	is	33.	case	50.	sit
17.	I	34.	race		

I've found 50. Can you get that many?

LEARNING ACTIVITY PACKAGE 2

Category: General Information

Focus: Use of Reference Materials

Activity: Discussion/Demonstration

Objective: At the conclusion of this lesson, the student will be able to describe orally at least three career reference materials available for use in the preparation of written reports.

EQUIPMENT, SUPPLIES, AND FORMS

1. Career information references.
2. What I Have Read About My Job (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to expose students to various reference sources on careers, the location of this material, and how each source is used.

SUGGESTED PROCEDURE

A teacher should have as much career information as possible in the classroom. One of the best references for obtaining career information is Occupational Literature: An Annotated Bibliography. H. W. Wilson Company, New York. This book lists approximately 6,000 selected references on available occupational literature.

Another primary source of career information is the Occupational Outlook Handbook, U. S. Government Printing Office, Washington, DC. This handbook provides valuable information for more than 800 occupations, including: nature of work, earnings, job prospects, and education and training requirements.

A third source of career information is The Encyclopedia of Careers and Vocational Guidance, J. E. Ferguson Publishing Company, Chicago. Volume I ("Planning Your Career") contains five guidance articles and 71 articles on opportunities in major industries or areas of work such as advertising, mining, and medicine. Volume II ("Careers and Opportunities") contains 220 articles on specific occupations. These articles give detailed information about the nature of work, educational and special requirements, history, methods of entry, advancement, employment outlook, earnings, conditions of work, social and psychological factors, and sources of additional information.

In addition to these primary references, free materials may be obtained from business and industry. You may want to ask students to send for these materials as a class assignment. Each student would write a letter to one or two sources requesting career information. The teacher should approve each request letter. This class project is interesting for students, and it is an easy way to start a classroom resource file of career information.

The librarian, counselors, or vocational teachers in your school may have some of the suggested references or other career references. Your public library, local chamber of commerce, and local businesses should be able to provide career information. Additional sources of information are tapes, films, filmstrips, radio and television programs, newspaper articles, want ads, and the interviews of resource people.

Collect and display as many different career reference sources as you can, explaining for each the type of information contained, how to use it and its usual location. A form titled What I Have Read About My Job to be used by the students in recording

information that they have read on careers, is included below.

OTHER SUGGESTED REFERENCES

Career Research Monographs, The Institute of Research, Chicago, IL.

Cumulative Career Index, Chronicle Guidance Publications, Inc., Moravia, NY 13118

Yellow Pages of Learning Resources, Group for Environmental Education, Inc., Philadelphia, PA 19107

A variety of up-to-date career information and materials is available from: Division of Vocational and Technical Education, Illinois Office of Education, 100 North First Street, Springfield, IL 62777; or from Media and Resources Center, Illinois Office of Education, 100 North First Street, Springfield, IL 62777.

WHAT I HAVE READ ABOUT MY JOB

Name_____ Date_____

For use with books, magazines, articles, newspapers, pamphlets

Please keep a record here of anything you read about the job in which you are most interested. If you need more forms, ask your teacher.

Name of Article, Book, etc._____

Author_____ Date of Publication_____

Where Found_____ Date Read_____

Brief description of field covered_____

_____

_____

_____

Name of Article, Book, etc._____

Author_____ Date of Publication_____

Where Found_____ Date Read_____

Brief description of field covered_____

_____

_____

_____

Name of Article, Book, etc._____

Author_____ Date of Publication_____

Where Found_____ Date Read_____

Brief description of field covered_____

_____

LEARNING ACTIVITY PACKAGE 3

Category: Marketing

Focus: Sales Occupations

Activity: Film/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate on student worksheets his/her understanding of sales careers and problems.

EQUIPMENT, SUPPLIES, AND FORMS

1. Film - Is A Sales Career For You? Available on loan from: Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777.

2. Student exercise: Declining Sales (see sample enclosed in this learning package).

RATIONALE

The purpose of the film is to introduce the students to sales occupations, the nature of the work, the temperaments and aptitudes salespeople should have, the rewards, and the prospects for advancement.

SUGGESTED PROCEDURE

Introduce the film to the students, indicating to them that they are to be looking for answers to the following questions.

1. What different kinds of salesmen and saleswomen are there?
2. What traits and aptitudes should you have to be a good salesperson?
3. What is the employment outlook in this field now?
4. Where are salespeople needed in the United States?
5. What education or training should you have for a career in sales?
6. What are the prospects for advancement?
7. Are salespeople well paid?
8. Are there opportunities for young people from multiethnic groups in sales?
9. What local companies employ salespeople?
10. A salesperson is an important contributor to the country's economy. Why?

Divide the class into small groups and have them solve the problems of declining sales given below. Have each group write their answers to the three problems.

Have a representative from each group explain to the class their answers to the first problem. Write the best answers on the board and discuss the most effective solution. Do the same for problems two and three.

DECLINING SALES

You are the owner-manager of a company which manufactures and distributes its own cookies. The company produces many kinds of cookies and distributes them through supermarkets in one regional area.

The company employs five salespeople. Each salesperson is responsible for taking orders at the store visited and is responsible for keeping fresh stock on the shelves. All the salespeople have developed close relationships with the store managers, who trust them to keep the right amounts of fresh goods on hand. Service is an important consideration in attracting and maintaining customer loyalty.

The company has been showing a decrease in profits over the past two years, and a consultant has been hired to help solve the problems and increase profits. The consultant explains that the major problem is in the area of sales.

After receiving this information, you call in your salespeople individually and discover the following information about each:

Salesperson A has been involved in an increasingly competitive market in the area, and thus has had to reduce the price charged. Although the sales volume has increased, the profits are only slightly over costs.

Salesperson B has been making calls to a large number of accounts and did not have to cut markups, but after a careful analysis it was found that each account is very small and therefore produces little profit.

Salesperson C is liked very much by the customers. The reason is that this salesperson has been spending huge amounts of money entertaining them.

Salesperson D has been working with existing accounts. The problem is that this salesperson has not had one new account in the past year.

PROBLEMS

1. Use handout, Sound Criteria for Measuring Performance, to select criteria that should be used to judge each salesperson. (See below.)
2. How would you improve the performance of each of the four salespeople? (See Guide for Improving a Salesperson's Performance and Correcting handouts below.)
3. Assume you have decided that Salesperson B should eliminate low-margin accounts and spend more time promoting new accounts and developing existing accounts. After two months you find this goal is not being achieved. What action would you take? (See Correcting handout below.)

SOUND CRITERIA FOR MEASURING PERFORMANCE

Which of the following are sound criteria for measuring the performance of salespeople?

1. Volume of sales in dollars.
2. Amount of time spent in the office.
3. Personal appearance; for example, clothes, style of haircut, cleanliness, and neatness.
4. Number of calls made on existing accounts.
5. Number of new accounts opened.
6. Completeness and accuracy of sales orders.
7. Promptness in submitting reports.
8. Dollars spent in entertaining customers.
9. Extent to which salesperson sells the company.
10. Accuracy in quoting prices and deliveries to customers.
11. Knowledge of the business.
12. Planning and routing of calls.

GUIDE FOR IMPROVING A SALESPERSON'S PERFORMANCE

One goal of measuring salespeople's performance is to help them improve. The three steps in bringing about improvement, when and if it is needed, are: planning, measuring, and correcting.

PLANNING

Get the salesperson's agreement about what is to be attained or exceeded for the next year:

1. Total profit contribution in dollars.

2. Profit contribution in dollars for:

   Each major product line.
   Each major market (by industry or geographical area).
   Each of 10-20 target accounts (for significant new and additional business).

Get the salesperson's agreement about expenses within which they are to stay for the next year:

1. Total sales expense budget in dollars.

2. Budget in dollars for: travel, customer entertainment, telephone, and other expenses.

Have the salesperson plan the number of calls to be made to accounts and prospects during the next year.

MEASURING

Review at least monthly the salesperson's record for:

1. Year-to-date progress toward the 12-month profit contribution goals.

2. Year-to-date budget compliance.

CORRECTING

Meet with the salesperson if the record shows that he/she is 10 percent or more off target. Review the number of calls made on each significant account plus what the person feels are the accomplishments and problems. In addition, you may need to do some of the following to help improve performance:

1. Give salesperson more day-to-day help and direction.
2. Accompany salesperson on calls to provide coaching.
3. Conduct regular sales meetings on subjects which salespeople want covered.
4. Increase sales promotion activities.
5. Transfer accounts to other salespeople if there is insufficient effort or progress.
6. Establish tighter control over price variances allowed.
7. Increase or reduce selling prices.
8. Add new products or services.
9. Increase salesperson's financial incentive.
10. Transfer, replace, or discharge salesperson.

LEARNING ACTIVITY PACKAGE 4

Category: Marketing

Focus: Cashier/Sales Clerk/Sales Representative/Sales Manager

Activity: Discussion/Student Exercises

Objective: At the conclusion of this lesson, the student will demonstrate, by completing the student worksheets, a knowledge of some of the basic skills and responsibilities for jobs in marketing.

EQUIPMENT, SUPPLIES, AND FORMS

1. Occupational Outlook Handbook.

2. Student exercises: Making Change, Sales Transactions, Planning an Itinerary, Daily Records, Sales Management (see samples enclosed in this learning package).

RATIONALE

Many students find employment as cashiers and sales clerks while in high school. The purpose of this activity is to familiarize students with other opportunities in the sales areas as well as those for cashiers and sales clerks.

SUGGESTED PROCEDURE

Discuss the jobs of cashier, sales clerk, sales representative, and sales manager. Use the Occupational Outlook Handbook as a guide.

Assign the following student exercises to be completed by each student as examples of duties found in marketing occupations (each is described on a handout included below):

A. Making Change - Cashiers and sales clerks.

B. Sales Transactions - Cashiers and sales clerks.

C. Planning an Itinerary - Sales representative.

D. Daily Records - Sales representative.

E. Sales Management - Sales manager.

An important duty for a sales clerk is showing a customer how a product is used. How the product will benefit the customer is an important factor in making a successful sale. Use the following activity to emphasize this point.

Divide the class into teams. Give each team the name of a commonly used product, and have each team list the benefits (selling points) of the product. Have a representative of each team recite their list of benefits to the class. Give five points for each benefit. Allow the rest of the class to name additional benefits of the product. Subtract three points from the team's score for every additional benefit described by the members of the class. The team with the greatest number of points is declared the winner.

MAKING CHANGE

Cashiers and sales clerks use the addition method in making change. Suppose a customer gives a $20 bill to pay for a purchase totaling $5.51 on the cash register. Included below are the steps for making change:

1. You accept the $20 from the customer and place it on the change plate of the cash register.

2. Think to yourself how much change is needed to build to $20 from $5.51, using as few coins and bills as possible. In this case it would be:

4 pennies	4 one-dollar bills
2 dimes	1 ten-dollar bill
1 quarter	

3. Starting with $5.51, count aloud the return of the change.

4. Before closing the drawer, place $20 in the correct section.

MAKING CHANGE (CONT'D)

Use as few coins and bills as possible.

Enter number of coins and bills only.

Denomination:	$.01	$.05	$.10	$.25	$.50	$1	$5	Total
$2.71 out of $ 5.00								
$ .19 out of $ .50								
$1.31 out of $ 5.00								
$ .79 out of $ 1.00								
$ .37 out of $10.00								
$ .22 out of $ .50								
$7.57 out of $ 7.75								
$3.03 out of $ 5.03								
$2.76 out of $10.00								
$1.57 out of $ 3.00								
$ .53 out of $ .75								
$2.01 out of $ 2.50								
$8.53 out of $10.00								

MAKING CHANGE (CONT'D)

Cashiers and sales clerks are expected to do more than just run a register. They also are required to do various types of arithmetic problems demonstrated in these problems:

1. A woman hands you 7 half-dollars, 18 quarters, 5 dimes, 14 nickels, and 28 pennies. She purchases an item for $9.45. What is her change?

2. A man brings in 5 half-dollars, 7 quarters, 27 dimes, 3 nickels, and 87 pennies. How much more does he need to purchase an item costing $10.98?

3. Shirts sell three for $9.98. A women has $5. How many shirts can she buy?

4. A woman has three items on lay-away. The items cost $3.98, $6.47, and $15.98. She has put $10.00 down to hold them. She hands you a $20 bill. What is her change?

5. A woman gives you three $10 bills. She bought two items costing $15.98 and $7.49. She hands you a $20 bill. What is her change?

6. A woman brings in an item costing $5.98 to exchange for one costing $9.88. She hands you a $20 bill. What is her change?

7. Shirts are selling three for $9.33. A woman wants to buy two. How much does she have to pay?

8. Shirts selling for $10.00 each are marked 25% off. A man wants to buy five. How much money does he need?

9. A woman exchanged three items costing $1.98, $6.98, and $10.39. She then bought two items costing $15.97 and $5.95. She hands you a $10 bill. What is her change?

10. A man bought six items costing $10.98, $12.98, $5.50, $2.96, $27.35, and $106.49. What is his total bill?

ANSWERS FOR MAKING CHANGE HANDOUT

PART A

Denomination:	$.01	$.05	$.10	$.25	$.50	$1	$5	Total
$2.71 out of $ 5.00	4			1		2		$2.29
$ .19 out of $ .50	1	1		1				.31
$1.31 out of $ 5.00	4	1	1		1	3		3.69
$ .79 out of $ 1.00	1		2					.21
$ .37 out of $10.00	3		1		1	4	1	9.63
$ .22 out of $ .50	3			1				.28
$7.57 out of $ 7.75	3	1	1					.18
$3.03 out of $ 5.03						2		2.00
$2.76 out of $10.00	4		2			2	1	7.24
$1.57 out of $ 3.00	3	1	1	1		1		1.43
$ .53 out of $ .75	2		2					.22
$2.01 out of $ 2.50	4		2	1				.49
$8.53 out of $10.00	2		2	1		1		1.47

PART B

1. $ .03
2. $3.01
3. one
4. $3.57
5. $6.53
6. $16.10
7. $ 6.22
8. $37.50
9. $7.43
10. $166.26

SALES TRANSACTIONS

Find the amount of sales tax using the Illinois sales tax schedule and the total amount to be paid on the following items:

1.	1 tube toothpaste	$ .65
2.	1 dress	10.00
	2 blouses, each @	3.00
3.	12 oranges, each @	.05
	1 loaf of bread	.25
	1 carton of milk	.50
4.	2 pairs socks, each @	.90
	1 sweater	15.99
5.	1 pkg. notebook paper	.50
	3 ink pens, each @	.15
	1 textbook	10.95
6.	1 purse	5.98
	2 pairs hose, each @	2.35
	1 skirt	7.95
7.	5 pairs socks, each @	.79
	2 pairs shorts, each @	3.95
	1 jacket	8.45
8.	5 lbs. potatoes, ea.@	.17
	3 cans of soup, ea. @	.09
	1 carton pop	.89
	2 bags peanuts, each @	.22
9.	1 pair earrings	7.89
	1 necklace	10.98
10.	1 typewriter ribbon	1.85
11.	1 bottle perfume	3.00
	1 can shaving cream	.75
	4 bars soap, each @	.23
	2 bottles hand lotion,ea.@	.99
12.	1 desk lamp	3.98
	1 chair	12.00
13.	3 lbs. candy, each @	.35
	1 box kleenex	.28
	1 full-length mirror	9.95
14.	3 chocolate sodas, each @	.40
	1 bottle aspirin	.60
	1 can hairspray	.79
15.	1 radio	18.99
16.	3 sheets, each @	1.49
	1 blanket	11.49
17.	1 manicure set	9.50
	1 electric comb	6.98
18.	1 basketball	4.99
	1 air pump	3.87
19.	12 pieces of gum, each @	.01
20.	1 sunlamp	15.95

5% TAX EXPENSE COLLECTION SCHEDULE

ILLINOIS COMBINED STATE AND CITY TAX

Transaction	Add	Transaction	Add	Transaction	Add
$ .01 – $ .12	.00	16.50 – 16.69	.83	32.90 – 33.09	1.65
.13 – .25	.01	16.70 – 16.89	.84	33.10 – 33.29	1.66
.26 – .46	.02	16.90 – 17.09	.85	33.30 – 33.49	1.67
.47 – .67	.03	17.10 – 17.29	.86	33.50 – 33.69	1.68
.68 – .88	.04	17.30 – 17.49	.87	33.70 – 33.89	1.69
.89 – 1.09	.05	17.50 – 17.69	.88	33.90 – 34.09	1.70
1.10 – 1.29	.06	17.70 – 17.89	.89	34.10 – 34.29	1.71
1.30 – 1.49	.07	17.90 – 18.09	.90	34.30 – 34.49	1.72
1.50 – 1.69	.08	18.10 – 18.29	.91	34.50 – 34.69	1.73
1.70 – 1.89	.09	18.30 – 18.49	.92	34.70 – 34.89	1.74
1.90 – 2.09	.10	18.50 – 18.69	.93	34.90 – 35.09	1.75
2.10 – 2.29	.11	18.70 – 18.89	.94	35.10 – 35.29	1.76
2.30 – 2.49	.12	18.90 – 19.09	.95	35.30 – 35.49	1.77
2.50 – 2.69	.13	19.10 – 19.29	.96	35.50 – 35.69	1.78
2.70 – 2.89	.14	19.30 – 19.49	.97	35.70 – 35.89	1.79
2.90 – 3.09	.15	19.50 – 19.69	.98	35.90 – 36.09	1.80
3.10 – 3.29	.16	19.70 – 19.89	.99	36.10 – 36.29	1.81
3.30 – 3.49	.17	19.90 – 20.09	1.00	36.30 – 36.49	1.82
3.50 – 3.69	.18			36.50 – 36.69	1.83
3.70 – 3.89	.19	20.10 – 20.29	1.01	36.70 – 36.89	1.84
3.90 – 4.09	.20	20.30 – 20.49	1.02	36.90 – 37.09	1.85
4.10 – 4.29	.21	20.50 – 20.69	1.03	37.10 – 37.29	1.86
4.30 – 4.49	.22	20.70 – 20.89	1.04	37.30 – 37.49	1.87
4.50 – 4.69	.23	20.90 – 21.09	1.05	37.50 – 37.69	1.88
4.70 – 4.89	.24	21.10 – 21.29	1.06	37.70 – 37.89	1.89
4.90 – 5.09	.25	21.30 – 21.49	1.07	37.90 – 38.09	1.90
5.10 – 5.29	.26	21.50 – 21.69	1.08	38.10 – 38.29	1.91
5.30 – 5.49	.27	21.70 – 21.89	1.09	38.30 – 38.49	1.92
5.50 – 5.69	.28	21.90 – 22.09	1.10	38.50 – 38.69	1.93
5.70 – 5.89	.29	22.10 – 22.29	1.11	38.70 – 38.89	1.94
5.90 – 6.09	.30	22.30 – 22.49	1.12	38.90 – 39.09	1.95
6.10 – 6.29	.31	22.50 – 22.69	1.13	39.10 – 39.29	1.96
6.30 – 6.49	.32	22.70 – 22.89	1.14	39.30 – 39.49	1.97
6.50 – 6.69	.33	22.90 – 23.09	1.15	39.50 – 39.69	1.98
6.70 – 6.89	.34	23.10 – 23.29	1.16	39.70 – 39.89	1.99
6.90 – 7.09	.35	23.30 – 23.49	1.17	39.90 – 40.09	2.00
7.10 – 7.29	.36	23.50 – 23.69	1.18		
7.30 – 7.49	.37	23.70 – 23.89	1.19	40.10 – 40.29	2.01
7.50 – 7.69	.38	23.90 – 24.09	1.20	40.30 – 40.49	2.02
7.70 – 7.89	.39	24.10 – 24.29	1.21	40.50 – 40.69	2.03
7.90 – 8.09	.40	24.30 – 24.49	1.22	40.70 – 40.89	2.04
8.10 – 8.29	.41	24.50 – 24.69	1.23	40.90 – 41.09	2.05
8.30 – 8.49	.42	24.70 – 24.89	1.24	41.10 – 41.29	2.06
8.50 – 8.69	.43	24.90 – 25.09	1.25	41.30 – 41.49	2.07
8.70 – 8.89	.44	25.10 – 25.29	1.26	41.50 – 41.69	2.08
8.90 – 9.09	.45	25.30 – 25.49	1.27	41.70 – 41.89	2.09
9.10 – 9.29	.46	25.50 – 25.69	1.28	41.90 – 42.09	2.10
9.30 – 9.49	.47	25.70 – 25.89	1.29	42.10 – 42.29	2.11
9.50 – 9.69	.48	25.90 – 26.09	1.30	42.30 – 42.49	2.12
9.70 – 9.89	.49	26.10 – 26.29	1.31	42.50 – 42.69	2.13
9.90 – 10.09	.50	26.30 – 26.49	1.32	42.70 – 42.89	2.14
		26.50 – 26.69	1.33	42.90 – 43.09	2.15
10.10 – 10.29	.51	26.70 – 26.89	1.34	43.10 – 43.29	2.16
10.30 – 10.49	.52	26.90 – 27.09	1.35	43.30 – 43.49	2.17
10.50 – 10.69	.53	27.10 – 27.29	1.36	43.50 – 43.69	2.18
10.70 – 10.89	.54	27.30 – 27.49	1.37	43.70 – 43.89	2.19
10.90 – 11.09	.55	27.50 – 27.69	1.38	43.90 – 44.09	2.20
11.10 – 11.29	.56	27.70 – 27.89	1.39	44.10 – 44.29	2.21
11.30 – 11.49	.57	27.90 – 28.09	1.40	44.30 – 44.49	2.22
11.50 – 11.69	.58	28.10 – 28.29	1.41	44.50 – 44.69	2.23
11.70 – 11.89	.59	28.30 – 28.49	1.42	44.70 – 44.89	2.24
11.90 – 12.09	.60	28.50 – 28.69	1.43	44.90 – 45.09	2.25
12.10 – 12.29	.61	28.70 – 28.89	1.44	45.10 – 45.29	2.26
12.30 – 12.49	.62	28.90 – 29.09	1.45	45.30 – 45.49	2.27
12.50 – 12.69	.63	29.10 – 29.29	1.46	45.50 – 45.69	2.28
12.70 – 12.89	.64	29.30 – 29.49	1.47	45.70 – 45.89	2.29
12.90 – 13.09	.65	29.50 – 29.69	1.48	45.90 – 46.09	2.30
13.10 – 13.29	.66	29.70 – 29.89	1.49	46.10 – 46.29	2.31
13.30 – 13.49	.67	29.90 – 30.09	1.50	46.30 – 46.49	2.32
13.50 – 13.69	.68			46.50 – 46.69	2.33
13.70 – 13.89	.69	30.10 – 30.29	1.51	46.70 – 46.89	2.34
13.90 – 14.09	.70	30.30 – 30.49	1.52	46.90 – 47.09	2.35
14.10 – 14.29	.71	30.50 – 30.69	1.53	47.10 – 47.29	2.36
14.30 – 14.49	.72	30.70 – 30.89	1.54	47.30 – 47.49	2.37
14.50 – 14.69	.73	30.90 – 31.09	1.55	47.50 – 47.69	2.38
14.70 – 14.89	.74	31.10 – 31.29	1.56	47.70 – 47.89	2.39
14.90 – 15.09	.75	31.30 – 31.49	1.57	47.90 – 48.09	2.40
15.10 – 15.29	.76	31.50 – 31.69	1.58	48.10 – 48.29	2.41
15.30 – 15.49	.77	31.70 – 31.89	1.59	48.30 – 48.49	2.42
15.50 – 15.69	.78	31.90 – 32.09	1.60	48.50 – 48.69	2.43
15.70 – 15.89	.79	32.10 – 32.29	1.61	48.70 – 48.89	2.44
15.90 – 16.09	.80	32.30 – 32.49	1.62	48.90 – 49.09	2.45
16.10 – 16.29	.81	32.50 – 32.69	1.63	49.10 – 49.29	2.46
16.30 – 16.49	.82	32.70 – 32.89	1.64	49.30 – 49.[illegible]	2.47

ILLINOIS RETAIL MERCHANTS ASSOCIATION

ANSWERS FOR SALES TRANSACTIONS HANDOUT

1.	$ .68	11.	$ 6.98
2.	$16.80	12.	$16.78
3.	$ 1.42	13.	$11.84
4.	$18.68	14.	$ 2.72
5.	$12.50	15.	$19.94
6.	$19.56	16.	$16.76
7.	$21.32	17.	$17.30
8.	$ 2.57	18.	$ 9.30
9.	$19.81	19.	$ .12
10.	$ 1.94	20.	$16.75

PLANNING AN ITINERARY

You are a statewide sales representative for a pharmaceutical company located in Bloomington, Illinois. You have 12 customers to visit, one in each of the cities listed on the map. You must try to visit as many customers as possible in a two-day period because of the working hours of your customers (8-5). However, your day begins at 7:00 a.m. and ends at 6:00 p.m. Use this extra time for traveling.

Plan an itinerary which will provide the best use of your time. The following is a list of things which you should consider in planning your itinerary:

1. Estimated traveling time is 60 miles per hour, or one mile per minute (used in place of the 55 mile-per-hour limit to simplify the problem).

2. Average time you usually spend waiting to talk to a customer: 30 minutes.

3. Average time spent with each customer:
   Previous customer: 1 hour
   New customer: 1 1/2 hours

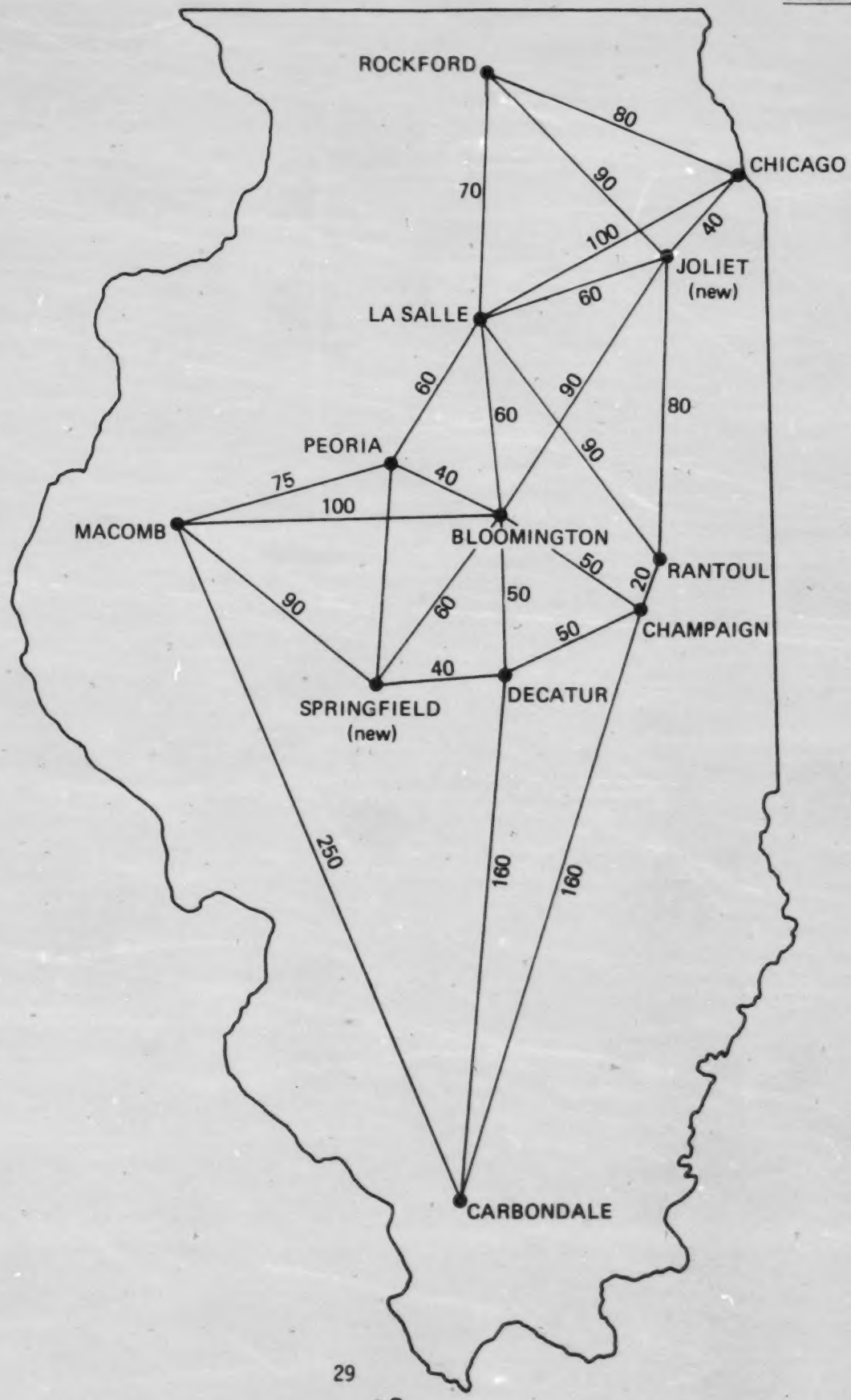
4. After your itinerary is set, follow this procedure to determine if your customer is not available: flip a coin three times. If heads appear on all three trials, the customer is not available to see you that day. If heads appear on one or two trials, the customer is available to see you.

Make up a travel log listing the cities in the order you plan to visit them. Estimate travel time between cities. Plan how much time you can spend with each customer. Use the map of Illinois to determine this.

Student Handout

PLANNING AN ITINERARY (CONT'D)

City of Departure	Time Leaving	Arrival Point	Time Arriving	Time Driving	Customer In or Out	Waiting Time	Visiting Time	Total Time Spent


ROCKFORD
CHICAGO
JOLIET
(new)
LA SALLE
PEORIA
MACOMB
BLOOMINGTON
RANTOUL
CHAMPAIGN
SPRINGFIELD
(new)
DECATUR
CARBONDALE
80
70
90
100
40
60
60
60
90
80
90
75
40
100
50
20
90
60
50
50
40
250
160
160

DAILY RECORDS

Analyze the information in the daily records of Mr. Bell, a salesperson for the Lawson Company. Use the Monthly Summary Form to summarize the information in the daily records.

DATE	ACTIVITY	HOURS	EXPENSES
4/1	monthly sales meeting	7	
4/2	visited J. L. Merril Company	3	
	took manager to lunch	1½	$4.50
	visited prospective new account, Norwood Company	2	
	wrote follow-up letters	1	
	travel (gas)	1	$1.50
4/3	visited B.L. Sloan Company	2	
	visited Pitman Company	1½	
	visited prospective new account, J. P. Scott Company	1½	
	lunch	1	$1.50
	travel (gas)	2	$3.00
4/4	wrote follow-up letters	1	
	visited R. Wakefield Company	3	
	took manager to lunch	1½	$5.00
	travel (gas)	2½	$4.00
4/5	visited M. Bolon's Company	2	
	lunch	1	$1.50
	travel (gas)	2	$3.00
	follow-up letters	½	
	wrote up weekly sales report	3	
4/8	visited D. L. Harmon Company, helped set up point-of-purchase display	5	
	lunch	1	$2.00
	travel (gas)	1	$1.00
	follow-up letters	1	
4/9	visited Norwood Company	2	
	visited J. R. Scott Company	2	
	took manager to lunch	1	$6.00
	travel (gas)	1	$1.00
	wrote follow-up letters	1	

DAILY RECORDS (CONT'D)

DATE	ACTIVITY	HOURS	EXPENSES
4/10	visited Michael Van Buren Company	1½	
	visited J. M. Cluburn Company	1	
	visited C. H. Trench Company	2	
	lunch	½	$1.50
	travel (gas)	1	$1.00
	wrote follow-up letters	2	
4/11	sales convention-Chicago	8	
4/12	sales convention-Chicago	8	
4/13	wrote up weekly sales report	3	
4/15	visited prospective account, Worcan Company	3	
	took manager to lunch	1½	$5.00
	visited C. M. Jenkins Company	2	
	travel (gas)	1	$1.00
	wrote follow-up letters	1	
4/16	visited Norwood Company	2	
	took manager to lunch	1½	$6.00
	travel (gas)	2	$2.00
	wrote follow-up letters	1	
4/17	visited Charles Cambridge Company	3	
	lunch	1	$2.00
	visited D. R. Richards Company	2	
	travel (gas)	1½	$1.50
	wrote follow-up letters	1	
4/18	visited prospective account, C. W. Sanders	2½	
	took manager to lunch	2	$7.00
	visited Borland Company	1½	
	travel (gas)	1½	$1.50
	wrote follow-up letters	1	
4/19	home office meeting	4	
	lunch	1	$2.00
	travel (gas)	2	$2.00
	wrote up weekly sales report	2	
4/22	visited Norwood Company	2	
	visited J. R. Scott Company	2	
	took head buyer to lunch	1½	$5.00
	travel (gas)	1	$1.00
	wrote follow-up letters	1½	

DAILY RECORDS (CONT'D)

DATE	ACTIVITY	HOURS	EXPENSES
4/23	visited Worcan Company	2	
	visited C. W. Sanders Company	1½	
	took manager to lunch	1½	$4.00
	travel (gas)	1½	$1.00
	wrote follow-up letters	2	
4/24	visited David Borg Company	3	
	took purchasing agent to lunch	1½	$4.00
	visited prospective account, A. Gerth Company	2	
	travel (gas)	1	$1.00
	wrote follow-up letters	1	
4/25	visited D. R. Himes, helped with point-of-purchase display	5	
	lunch	1	$2.00
	wrote follow-up letter	1	
	travel (gas)	1½	$1.50
4/26	visited M. S. Kirk Company	2	
	lunch	1	$1.50
	travel (gas)	1	$1.00
	wrote up weekly sales report	4	
4/29	visited Norwood Company	2½	
	visited A. Gerth Company	2	
	lunch	1	$2.00
	travel (gas)	1	$1.00
	wrote follow-up letters	1½	
4/30	visited Worcan Company	2	
	visited C. W. Sanders	2	
	took manager to lunch	1½	$5.50
	travel (gas)	2	$2.00
	wrote follow-up letters	1	

MONTHLY SUMMARY

Dates: _____ to _____

Salesperson: _____

Date	Visitations		Visitation Time		Expenses		Time		Writing Reports
	Old	New	Old	New	Lunch	Travel	Lunch	Travel	

Answer Key

MONTHLY SUMMARY

Dates: 4/1 to 4/30

Salesperson: Bell

Date	Visitations		Visitation Time		Expenses		Time		Writing Reports
	Old	New	Old	New	Lunch	Travel	Lunch	Travel	
4/1			7						
4/2	1	1	3	2	4.50	1.50	1½	1	1
4/3	2	1	3½	1	1.50	3.00	1	2	
4/4	1		3		5.00	4.00	1½	2½	1
4/5	2				1.50	3.00	1	2	3½
4/8	5				2.00	1.00	1	1	1
4/9	2		4		6.00	1.00	1	1	1
4/10	3		4½		1.50	1.00	½	1	2
4/11	1		8						
4/12	1		8						
4/13									3
4/15	1	1	2	3	5.00	1.00	1½	1	1
4/16	1		2		6.00	2.00	1½	2	1
4/17	2		5		2.00	1.50	1	1½	1
4/18	1	1	1½	2½	7.00	1.50	2	1½	1
4/19	1		4		2.00	2.00	1	2	2
4/22	2		4		5.00	1.00	1½	1	1½
4/23	2		3½		4.00	1.00	1½	1½	2
4/24	1	1	3	2	4.00	1.00	1½	1	1
4/25	1		5		2.00	1.50	1	1½	1
4/26	1		2		1.50	1.00	1	1	4
4/29	2		4½		2.00	1.00	1	1	1½
4/30	2		4		5.50	2.00	1½	2	1

SALES MANAGEMENT

There are five salespeople working in the Eastern District of the Manchester Wire Company. The cost of these salespeople for the last year included:

Sales Area	Annual Compensation	Salesperson	Expense Payment
A	$11,400	A	$ 5,600
B	$10,800	B	$ 7,200
C	$10,200	C	$ 5,800
D	$ 9,600	D	$12,400
E	$10,000	E	$16,000

By checking the sales figures for the last year, the district sales manager determined the total volume of sales for each sales area:

Sales Area	Sales Produced
A	$456,000
B	$360,000
C	$280,000
D	66,000
E	31,000

Use this data to answer the following questions:

1. For which sales area were the salesperson's total expenses the highest? Lowest?

2. Which sales area produced the greatest volume of sales?

3. If you were the district sales manager, which sales area would you eliminate?

4. What is the total salesperson cost for the Eastern District?

5. The manager found the direct-selling expense ratio for this district by dividing the total compensation and expenses of the salespeople ($99,000) by the total sales for the year ($1,193,000). The direct-selling expense ratio was 8.3%. This means that 8.3% of the total sales was used to support the sales force. What were the direct-selling expense ratios for each of the five sales areas?

SALES MANAGEMENT (CONT'D)

1. Highest, Sales Area E; lowest, sales area A.

2. Sales Area A produced a sales volume of $456,000.00.

3. Sales Area E should be eliminated because of low sales volume and high expenses.

4. $99,000.00.

5.

Sales area	Direct selling expense ratio
A	3.73%
B	5.00%
C	5.72%
D	33.00%
E	83.90%

LEARNING ACTIVITY PACKAGE 5

Category: Marketing

Focus: Advertising and Display

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will demonstrate familiarity with careers in advertising by completing a career information worksheet and designing an advertising campaign for a school fund-raising project.

EQUIPMENT, SUPPLIES, AND FORMS

1. Occupational Outlook Handbook.
2. Student exercise: Career Information (see sample enclosed in this learning package).
3. Student exercise: Advertising and Displays Information. (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to make the students aware of jobs in advertising and to give them an opportunity to prepare an advertising campaign.

SUGGESTED PROCEDURE

Prepare student information handouts on advertising workers from the Occupational Outlook Handbook. Using the handouts, complete the Career Information Sheet below as a class activity or have each student complete the sheet individually. Discuss with the students their answers on the Career Information Sheet, assigning students to research or follow up those sections which could not be answered completely. Example: Section IV, question B. "Where can this education be obtained?" The Occupational Outlook Handbook does not give the names of specific schools, but does give an address where a list of schools providing training in advertising can be obtained. A student or group of students can be assigned to draft a letter requesting such information.

Distribute the student handout titled Advertising and Displays, assigning the student to read the information about advertising and displays. Have each student assume the role of advertising chairperson for his/her class. As advertising chairperson he/she is to: (1) organize a fund-raising project, including deciding on what method is to be used to raise the funds; (2) identify ways to advertise and display products or services to be sold or promoted; (3) design a poster or ad layout suitable for the newspaper, and list attractive locations for poster and displays, explaining reasons for their selection.

This type of an activity could be undertaken by the class for actual fund raising or for program promotion in the school.

CAREER INFORMATION SHEET

I. Job title _____

II. Description of job duties (please list).

A. _____

B. _____

C. _____

D. _____

E. _____

III. Job characteristics. Check those which apply to a worker in this occupation.

A. Able to see physical results of work. _____
B. Competitive; must compete for advancement. _____
C. Directs activities of others; supervisory. _____
D. Helps people. _____
E. High level of responsibility. _____
F. Motivates others; must have ability to influence. _____
G. Repetitious work. _____
H. Requires physical stamina. _____
I. Self-expression is encouraged. _____
J. Closely supervised by superiors. _____
K. Works with technical data. _____
L. Works with people. _____
M. Works alone. _____
N. Manual skills required. _____

IV. Educational requirements.

A. Check level required for this occupation.

1. High school education desirable. _____
2. High school education required. _____
3. Community college. _____
4. Four years college, baccalaureate. _____
5. Advanced degree, masters. _____
6. Advanced degree, doctorate. _____

CAREER INFORMATION SHEET (CONT'D)

B. Where can this education be obtained? Name one or two schools or industries where training is available (include addresses, if available).

_____

_____

_____

_____

C. List the courses, subject areas, and topics you will need to study.

_____

_____

_____

_____

D. How many years of experience and what type of training is needed before entering this occupation?

_____

_____

_____

V. Employment opportunities.

A. List employers in your area.

_____

_____

B. Is it likely that you will be able to find employment in this occupation locally? (Yes or No)_____If no, where might employment be obtained?_____

_____

CAREER INFORMATION SHEET (CONT'D)

C. What starting wage or salary can you expect?_____

D. How are wages determined?

Union_____Individual contract_____Salary schedule_____

E. What position could you advance to after experience is obtained?

_____

How much pay would you expect to receive in this advanced position?_____

F. What are some of the fringe benefits of this occupation?_____

_____

_____

_____

VI. Working conditions. Check those which apply to this occupation.

A. Overtime required. _____
B. Outdoor work. _____
C. Indoor work. _____
D. Hazardous conditions (specify). _____
E. Variety of jobs. _____
F. Seasonal work. _____
G. Travel required. _____
H. Unusual working hours. _____
I. Dusty or noisy conditions _____

VIII. Where can you obtain additional information about this occupation (list books, persons, etc., including addresses)?

_____

_____

_____

ADVERTISING AND DISPLAYS INFORMATION

ADVERTISING INFORMATION

Advertising presents facts about the goods, while a display presents the actual merchandise.

Business advertises to increase sales. In retailing, advertising can promote and maintain a store's image and reputation. A particular method of advertising is called a medium. For instance, television is considered a medium; television and radio together are called the broadcast media. Newspapers are another medium. Advertising is used for the following purposes:

1. Advertising tells people about you, your store, and what you have to sell.
2. Advertising builds goodwill, and a good reputation for the business.
3. Advertising tells what your merchandise will do for the customer, what it costs, and why the customer should buy from you.
4. Advertising must be truthful. If you mislead customers, they will find out and also let their friends know.
5. Frequent advertising is usually more productive than a one-time effort.
6. Advertising should give people good reasons for buying from you.
7. Advertising attracts new customers, holds old ones, increases sales, and reduces expenses.

DISPLAYS INFORMATION

A. Displays may be placed: 1) inside the front door; 2) to the right of the entrance; 3) at ends of right aisles; 4) at ends of cross aisles; 5) opposite the service counter or lay-away desk; 6) at checkout counters or near the cash register.

B. Maintain displays by: 1) keeping mass displays filled up; 2) grouping merchandise; 3) using price cards; 4) displaying products in use; 5) relating products to one another; 6) not over-using banners, pennants, and streamers.

C. Guides for window displays: 1) the name of the store should appear in or near the window; 2) glass and the display area should be kept clean; 3) displays should be changed frequently; 4) displays should have a theme or central idea; 5) tie-ins with seasons, holidays, and local events add interest; 6) displays should not be cluttered or scattered; 7) items displayed in the same window should be related; 8) the display should have a central idea; 9) use proper lighting.

ADVERTISING AND DISPLAYS INFORMATION (CONT'D)

D. The four goals of display include: 1) locate goods for the best visibility; 2) show and locate goods for the best salability; 3) be attractive; 4) be easily identifiable.

E. Eight purposes of display are: 1) to present merchandise visually; 2) to attract attention to the store; 3) to introduce holiday or special sales; 4) to build the store image; 5) to stop sidewalk traffic; 6) to tell a story; 7) to arouse interest; 8) to sell merchandise.

F. Attention-getting elements in a display: 1) bright lighting; 2) bright colors; 3) strong contrasts; 4) timely merchandise; 5) something new or novel; 6) pleasing features; 7) large, readable signs; 8) an interesting theme; 9) simplicity.

G. The fundamental rules for effective display: 1) advertise the image of the store; 2) include human interest touches; 3) suggest the use of merchandise; 4) display seasonal goods; 5) display related items together; 6) group merchandise; 7) avoid crowding; 8) stress simplicity; 9) plan windows in advance; 10) be sure of adequate lighting; 11) keep windows clean; 12) give prices of merchandise; 13) make careful use of color; 14) change display regularly.

LEARNING ACTIVITY PACKAGE 6

Category: Marketing

Focus: Overview of Retail Marketing Positions

Activity: Field Trip/Student Exercise

Objective: At the conclusion of this lesson, the student will have observed and be aware of various retail marketing jobs, as evidenced by completion of an observation form and student exercise, and will have operated a cash register and learned to read tickets attached to merchandise.

EQUIPMENT, SUPPLIES, AND FORMS

1. Field Trip Observation Form (see sample in the back of this notebook).

2. Student exercise: Retail Automobile Dealer (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to give the students an opportunity to observe the jobs that have been discussed and to give them the feeling of a cashier's or sales clerk's job.

SUGGESTED PROCEDURE

Arrange in advance with a retail store owner or manager to have people in various positions in the store take a few minutes of their time and explain to the students the job that they do, how they obtained their position, and what they like or dislike about their job. Arrange to have the students instructed on how to read the tickets on merchandise and to operate a cash register. Ask that the students be allowed to enter the information from merchandise tickets into the cash register, add the correct tax, and determine the total amount of the sale.

Have the students complete their observation forms for the jobs or positions which they observed. If all of the students are not able to observe the same job, have those who observed something different report to the class.

Assign the student exercise, Retail Automobile Dealer, to be completed by each student. This will provide them with an idea of the organization of a different type of retail business.

RETAIL AUTOMOBILE DEALER

Given the following transactions with a retail automobile business, list in their order of importance the employees on the organizational chart who would be involved in the transactions and what their specific duties would be.

A. John Smith comes in to have the oil in his car checked and the car washed.

B. Acme Company wants a tune-up on three of their trucks.

C. A customer has a dent in his car's fender and wants it repaired. Some of the paint is also scratched off, and he wants it touched up.

D. A customer comes into the shop complaining that her car's steering pulls to the right.

E. An independent repair shop calls to order 10 car radios after seeing an advertisement promoting them in the newspaper.

F. A Benson Company representative stops in to inquire about new delivery trucks.

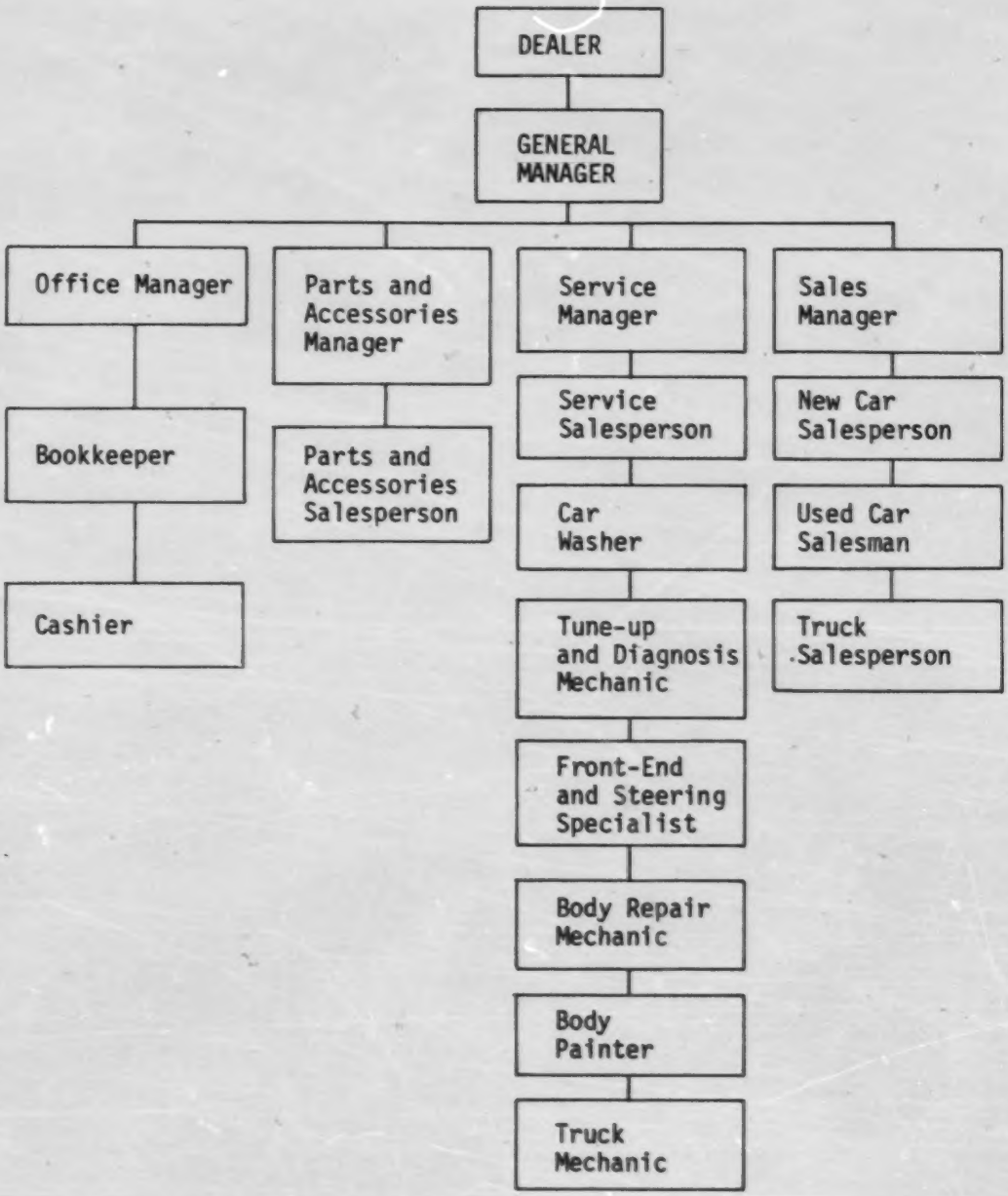
G. A customer wants to trade in her 1974 car for a new model.

H. A customer would like to buy the 1974 model automobile.

I. The retail automobile company wants to develop a regular sales training program for new salespeople.

J. The company's monthly financial statements are ready to be drawn up.

DEALER ORGANIZATION CHART



ANSWERS TO RETAIL AUTOMOBILE DEALER HANDOUT

A. Lubrication person and car washer.

B. Truck mechanic.

C. Body repair mechanic and body painter.

D. Front-end and steering specialist.

E. Parts and accessories manager and parts and accessories salesperson.

F. Truck salesperson.

G. New car salesperson.

H. Used car salesperson.

I. Sales manager.

J. Office manager and bookkeeper.

LEARNING ACTIVITY PACKAGE 7

Category: Marketing

Focus: Retailing Management

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will demonstrate, through active class participation in the student exercise, knowledge of the value of management and management responsibilities.

EQUIPMENT, SUPPLIES, AND FORMS

1. Student exercise: Case Problem (see sample enclosed in this learning package).

2. Student exercise: Delegating Work and Responsibility (see sample enclosed in this learning package).

3. Occupational Outlook Handbook.

RATIONALE

The purpose of this lesson is to impress upon the students the importance of management in retail outlets and to make them aware of the occupational possibilities that exist in retail management.

SUGGESTED PROCEDURE

The students should be made aware of the different types of retail stores and the different jobs available in retailing. See the Occupational Outlook Handbook and the local telephone directory for help.

Discuss with the students the different types of retail outlets and name some that are familiar to your students. Ask the students to describe some of the jobs that are found in these stores. Be sure to include specialists in such fields as advertising in the larger stores.

STUDENT EXERCISE: CASE PROBLEM

Have two students play the parts of John Davis (president of a large department store) and Alice Lewis (personnel director). They may memorize the script or use the script as background for the role-playing situation. The five questions at the end of the script can be answered individually or be discussed in small student groups.

STUDENT EXERCISE: DELEGATING WORK AND RESPONSIBILITY

Each student is to play the part of the general merchandise manager for a large firm. The work load has become exceedingly burdensome, and it is time to delegate some of the responsibility to subordinates. Have each student read the information in the handouts and answer the following questions: (1) What criteria would you use in deciding how much authority you should delegate? (2) How can you be sure you are delegating responsibility to the right person? (3) What qualities or traits should this person possess? (4) If this person was not achieving what you expected, what would you do to correct the situation? Each student should answer the above questions and be prepared to discuss them in class.

CASE PROBLEM

"Smith sold to Baltimore for $150,000." As Mr. John Davis, president of a large department store, read this headline, he said to his personnel director, "What would our staff be worth if we priced them like ball-players? How about Miller, the store manager, what is he worth?"

"Well," said Ms. Lewis, "With his experience, I'd say about $25,000."

"Don't forget, we had to hire six college kids before we got him," said Mr. Davis. "It all adds up. I'd say he's worth at least $40,000."

"You know," Ms. Lewis added, "I'll bet we spent $20,000 trying to get him, and he's not that outstanding. How about our top manager, Joan Michels over in the general office?"

"Yeah, we pay her $20,000 a year, and she's had six job offers since last March. She'd be worth at least $100,000," said Mr. Davis.

"Make it $200,000," Ms. Lewis said. "She's had 15 years of experience and training with our company. I bet we invested $300,000 in her."

"Don't forget the ones who didn't work out - add a few hundred thousand for them."

"You know, John, I'll bet we have more invested in our managers than most baseball teams have in their players," said Ms. Lewis.

"I bet you're right," added Mr. Davis.

QUESTIONS

1. Why does a business spend so much time and money to develop its managers?

2. How can a business know whether it's getting a good return on its investment?

3. Do you know of any firms using management training programs?

4. Do you believe the cost of training a manager are as high as this situation implies?

5. What is a manager's responsibility to a company after the company has spent large sums of money to train him/her?

DELEGATING WORK AND RESPONSIBILITY

Delegating work, responsibility, and authority is difficult in a small business because it means letting others make decisions which involve spending the owner-manager's money. At a minimum, the owner or manager should delegate enough authority to get the work done, to allow assistants to take initiative, and to keep the operation moving.

"Let others take care of the details."

That, in a few words, is the meaning of delegating work and responsibility.

In theory, the same principles for getting work done through other people apply whether you have 25 employees and one top assistant or 150 or 200 employees and several key people. Yet, putting the principles into practice is often difficult.

Delegation is perhaps the hardest job that owner-managers have to learn. Some never do. They insist on handling many details and work themselves into early graves. Others pay lip service to the idea but actually run a one-person shop. They give their assistants many responsibilities but little or no authority.

HOW MUCH AUTHORITY?

Authority is the fuel that makes the machine go when you delegate work and responsibility. It poses a question: To what extent do you allow another person to make decisions which involve spending your company's money?

That question is not easy to answer. Sometimes, an owner-manager has to work it out as things go along, as did Janet Brasser. Her pride in being the top person made it hard for her to share her authority. She tried, but she found to her dismay that her delegating was not as good as she thought.

One day when she returned from her first short business trip, Janet stormed out of her office. She waved a sheaf of payroll sheets and shouted, "Who approved all this overtime while I was away?"

"I did," the production chief answered.

Realizing that all heads were turned to see what the shouting was about, Janet lowered her voice. Taking the production manager with her, she stepped back into the office.

DELEGATING WORK AND RESPONSIBILITY (CONT'D)

There she told the production man, "You've got your nerve authorizing overtime. This is still my company, and I'll decide what extra costs we'll take on. You know good and well that our prices are not based on paying overtime rates."

"Right," the production man replied. "But you told me I was in full charge of production. You said I should keep pushing so I wouldn't fall behind on deliveries."

"That's right," Janet said. "In fact, I recall riding you about a couple of orders just before I went out of town."

"You can say that again. And one of them—the big order—was getting behind so I approved overtime for it."

"I would have done the same thing if I had been here," Janet said. "But let's get things straight for the future. From now on, overtime needs my okay. We've got to keep costs in line."

Janet then followed up with her other department heads, including her office manager and purchasing agent. She called them in, told them what had happened, and made it clear that their authority did not include making decisions that would increase the company's operating costs. (Such a decision had to have her approval, she pointed out, because it was her company.) She was the one who would lose, if and when, increased costs ate up profits.

Yet, if an owner-manager is to run a successful company, authority must be delegated properly. How much authority is proper depends on the situation.

At a minimum, you should delegate enough authority:

1. To get the work done.
2. To allow the key people to take initiative.
3. To keep things going in your absence.

TO WHOM DO YOU DELEGATE?

Delegation of responsibility does not mean that you say to your assistants, "Here, you run the shop." The people to whom you delegate responsibility and authority must be competent in the technical areas for which you hold them accountable. However, technical competence is not enough.

In addition, the person who fills a key management spot in the organization must either be a manager or be capable of becoming one. A manager's chief job is to plan, direct, and coordinate the work of others.

DELEGATING WORK AND RESPONSIBILITY (CONT'D)

This person should possess the three "I's"—initiative, interest, and imagination. The manager of a department must have enough self-drive to start and keep things moving. The manager should not have to be told, for example, to make sure that the employees start work on time.

Personality traits must be considered. A key person should be strong willed enough to overcome opposition when necessary. He or she should also have enough ego to want to "look good" but not so much that it antagonizes other employees.

SPELL OUT THE DELEGATION

Competent people want to know what they are being held responsible for. The experience of Charles P. Wiley illustrates how one owner-manager let them know. He started by setting up an organization. He broke his small company into three departments: a production department, a sales department, and an administrative department.

The person who handled production was responsible for manufacturing, packing, and shipping. The sales manager was responsible for advertising, customer solicitations, and customer service. Mr. Wiley regarded the administrative department as the headquarters and service unit for the other two. Its manager was responsible for personnel, purchasing, and accounting.

Mr. Wiley also worked out with the assistants the practice and procedures necessary for getting the jobs done. His assistants were especially helpful in pointing out any overlaps or gaps in the assigned responsibilities. He then put the procedures in writing. Thus, each supervisor had a detailed statement of the function of the department and the extent of authority.

This statement included a list of the specific actions which they could take on their own initiative and a list of actions which required approval in the front office—Mr. Wiley, or in his absence, the assistant general manager.

Mr. Wiley had thought about the times when he might be absent from the plant. To make sure that things would keep moving, the production manager was designated assistant general manager and given the authority to make all operational decisions in Mr. Wiley's absence.

In thinking about absences, Mr. Wiley went one step further. He instructed each department head to designate and train an assistant who could run the department if, and when, the need arose.

DELEGATING WORK AND RESPONSIBILITY (CONT'D)

When you spell out the delegation, be sure that departments are coordinated. The experience of another small plant owner, Abigail Chiefson, is a case in point.. She thought her departments were coordinated until the shop manager reported that they were swamped with "rush" orders.

"It's impossible for me to make good on Mary's promises," the shop manager said. Mary was the sales manager.

When Mary was called in, she said, "I had to promise early delivery to get the business."

Ms. Chiefson resolved the problem by instructing the sales manager and the shop manager to work out delivery dates together.

Make sure that departments are coordinated when you spell out the responsibilities and authority of each key person. Thus you reduce the chances of confusion as well as insuring that there is no doubt as to who is responsible for specific jobs. Then, the particular key people can take corrective action in their area of responsibility before things get out of hand.

KEEPING CONTROL

When you manage through others, it is essential that you keep control. You do it by holding subordinates responsible for their actions and checking the results of those actions.

In controlling your assistants, try to strike a balance. You should not get into a key person's operation so closely that you are "in their hair" nor should you be so far removed that you lose control of things.

You need feedback to keep yourself informed. Reports provide a way to get the right kind of feedback at the right time. They can be daily, weekly, or monthly, depending on how soon you need the information. Department heads can report their progress, or the lack of it, in the unit of production that is appropriate for the activity; for example, items packed in the shipping room, sales per territory, hours of work per employee.

Periodic staff meetings are another way to get feedback. At these meetings, department heads can comment on their activities, accomplishments, and problems.

COACHING YOUR STAFF

For the owner-manager, delegation does not end with good control. It involves coaching as well, because management ability is not acquired automatically. You have to teach it.

DELEGATING WORK AND RESPONSIBILITY (CONT'D)

You should be certain that you convey your thinking when you coach your assistants. Sometimes words can be inconsistent with thoughts. Ask questions to make sure that the listener understands your meaning. In other words, delegation can be effective only when you have good communications.

And above all, listen. Many owner-managers get so involved in what they are saying or are going to say next, that they do not listen to the other person. In coaching people to improve their ability, it is important to tell them why you are giving the instructions. When people know the reason, they are better able to supervise the employees who work for them.

ALLOW STAFF TO WORK

Sometimes an owner-manager gets involved in many operational details even though everything that is necessary for delegating responsibility has been done. In spite of defining authority, delegating to competent persons, spelling out the delegation, keeping control, and coaching, the owner-manager is still burdened with detail work. Why?

Usually, the owner-manager has failed to do one vital thing.

The owner-manager has refused to stand back and let the wheels turn.

If the owner-manager is to make delegation work, people must be allowed the freedom to do things their way. The owner-manager and the company are in trouble if the owner-manager tries to measure the assistants by whether they do a particular task exactly as the owner-manager would do it. They should be judged by their results—not their methods.

No two persons react exactly the same way in every situation. Be prepared to see some action taken differently from the way in which you would do it even though your policies are well defined. Of course, if an assistant strays too far from policy, you need to bring that person back in line. You cannot afford second guessing.

You should also keep in mind that when an owner-manager second guesses the assistants, their self-confidence may be damaged. If the assistant does not run the department to your satisfaction and if the shortcomings cannot be overcome, then replace that person. But when results prove the person's effectiveness, it is a good practice to avoid picking at each move he or she makes.

LEARNING ACTIVITY PACKAGE 8

Category: Marketing

Focus: Clerks/Officers/Tellers (Finance and Credit)

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate, through completion of the student exercise, an awareness of the jobs of clerks, officers, and tellers in a bank.

EQUIPMENT, SUPPLIES, AND FORMS

1. Occupational Outlook Handbook.
2. Overhead copy of the student exercise: Teller (see sample enclosed in this learning package).
3. Loan applications for student exercise: Loan Officer (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to expose students to some of the jobs available to them in banking by discussing the occupations of clerk, officer, and teller and completing student exercises which are related to these occupations.

SUGGESTED PROCEDURE

Hand out materials duplicated from the Occupational Outlook Handbook (banking occupations) to the students. Ask them to read about each job and to list facts from each topic heading. For example, for bank clerks they should list at least two important facts from each topic heading: Nature of Work; Training; Other Qualifications and Advancement; Employment Outlook; and Earnings.

After sufficient time has been allowed for reading and listing facts, discuss each job with the students, telling what facts they found to be important. You may wish to list these facts on the chalkboard and/or have the other students add them to their lists.

Using the overhead projector, show the students the situation (see below) created by the hiring of a new teller, Rod Henderson. Ask the students to orally express their feelings about each of the questions, then show them the suggested answers.

Next, have students assume the role of an officer in the loan department of The First National Bank of Roseland. Three customers have come to the officer with applications (see below) for loans. Have the students study the applications and answer the following questions:

1. Should all the applicants be granted loans?
2. Which credit application involves the least amount of risk?
3. What additional information is needed before discussing the applications with the applicants?
4. How would terms be established for repayment of the loans?
5. How could the specific information on the application forms be verified?

Suggestion: Forms for this type of exercise can be obtained from many community sources such as banks, savings and loan companies, life insurance companies, and small loan companies. Using forms from community businesses adds realism to the exercise.

TELLER

Rod Henderson has been a teller in a local bank for six months. There are four other tellers in the bank, all middle-aged women, who have worked for the bank for many years. Whenever he addresses the women he always calls them by their first name, which is disturbing to the women because they are 20 or more years his senior. In addition, he disregards their judgment when they voice their beliefs concerning matters in the bank. He has suggested some good ideas that have been put into effect. He is less experienced than the other tellers, but he believes his opinion is as good as theirs. Rod does a good job as a teller but is not liked by the other tellers.

1. What undesirable trait is Rod showing? Explain.
2. Are the older tellers justified in their opinion of Rod? Explain.
3. What may happen to the morale of the tellers if some remedial action is not taken?
4. What type of action should be taken to correct this problem?

SUGGESTED RESPONSES

1. He is showing a lack of respect to co-workers. Persons who are many years older than you should be addressed as Mr., Mrs., Miss, or Ms., until he/she indicates otherwise.
2. Yes, they have worked in the bank much longer and should have their beliefs in bank matters respected and considered.
3. The older women may decide that their years of service do not mean anything to the management if the situation isn't corrected. Their willingness to perform well on the job may decrease.
4. The supervisor should talk to Rod. It should be explained that, although his opinion may be good, everyone has a right to be heard. It should also be emphasized that the ability to get along with others is a high priority in a bank.

APPLICATION FOR LOAN TO: THE FIRST NATIONAL BANK OF ROSELAND

Date:	Amount Wanted $	Appl. Taken by:	Purpose of Loan:

Name in Full (Last) (First) (Middle)	Age	Spouse's

Address:	How Long:	Number of Children:

Buying ( ) Own ( ) Furn. ( ) Rent ( ) Unfurn.( )	Home Phone	Landlord or Mortgage Holder (Name & Address)

If Renting, Monthly Rent $	Mtg. Payments $	Balance Owing $	Previous address (if less than 5 years at present)	How Long

Previous Address (if less than 5 years established)	How Long

Employed by	Address of Employer	How Long

Position	Name & Title of Supervisor	Phone	Pay Day	Monthly Take Home Pay:

Previous Employer	Address	Position	How Long

Other Real Estate Owned (describe) of Other Assets (describe)	Market Value	Mortgage Payments 1st $ 2nd $	Balance Owing 1st $ 2nd $

Bank with Address of Bank	Checking ( ) Balance $ Savings ( ) Balance $	Acct. in Name of

Life Insurance (Name of Company)	Beneficiary	Face Value	Policy Loans	Cash Value

Nearest Relative (First Name) (Initial) (Last)	Address City State Zip

Trade References Payments Balance

_____

_____

_____

Time In_____

Final Action_____

Approved ( ) Renewal ( )

Guaranteed ( ) Rejected ( )

No Liability

Remarks:_____

_____

_____

I hereby certify that the above statements are true and correct and are made to obtain a loan from this bank. I agree to notify the bank concerning any material change in my financial condition. I authorize you to obtain any information you may require, and agree that this application shall remain the property of this bank whether the loan is granted or not.

SIGNED:_____

Approved:_____

Date:_____

Person Advised:_____

Time Out:_____

I hereby authorize The First National Bank of Roseland to debit my account for payment of this account.

SIGNED:_____

Student Handout

APPLICATION FOR LOAN TO: THE FIRST NATIONAL BANK OF ROSELAND

Date:	Amount Wanted $ 1450	Appl. Taken by:	Purpose of Loan:

Name in Full (Last)	(First)	(Middle)	Age	Spouse's
LESTER	JOSEPH	T	44	LINDA NICHOLS LESTER

Address: 1175 MARSHALL CT.	How Long: 20 YR.	Number of Children: 4

Buying ( ) Own (X) Furn. ( ) Rent ( ) Unfurn. ( )	Home Phone 642-6183	Landlord or Mortgage Holder (Name & Address) —

If Renting, Monthly Rent $	Mtg. Payments $ 0	Balance Owing $ 0	Previous address (if less than 5 years at present) —	How Long —

Previous Address (if less than 5 years established)	How Long

Employed by	Address of Employer	How Long
J.C. HIGGINS	36 W. ROOSEVELT	15 YR.

Position	Name & Title of Supervisor	Phone	Pay Day	Monthly Take Home Pay:
DIST. MGR.			MONTHLY	1500.00

Previous Employer	Address	Position	How Long
SEARS		DIST. MGR.	4 YR.

Other Real Estate Owned (describe) of Other Assets (describe)	Market Value	Mortgage Payments	Balance Owing
HOME IN FLORIDA, 1972 FORD		1st $ 70 2nd $ 95	1st $ 2800 2nd $ 2400

Bank with	Address of Bank	Checking (X) Balance $ 900 Savings (X) Balance $ 2,000	Acct. in Name of
GRANT NATIONAL	CHICAGO		JOSEPH LESTER

Life Insurance (Name of Company)	Beneficiary	Face Value	Policy Loans	Cash Value
COUNTRY MUTUAL	WIFE	30,000	NONE	8,000
COMPANY KILSEY	WIFE	10,000	NONE	1,800

Nearest Relative (First Name)	(Initial)	(Last)	Address	City	State	Zip
RANDY	T.	FOSTER	112 S. OAK	NORMAL	ILL.	

Trade References	Payments	Balance
LOWDER FORD	95.00	2400.00
FIRST REALTY	70.00	2800.00
J.C. HIGGINS	30.00	1400.00

Time In _____
Final Action _____
Approved ( ) Renewal ( )
Guaranteed ( ) Rejected ( )
No Liability
Remarks: _____

I hereby certify that the above statements are true and correct and are made to obtain a loan from this bank. I agree to notify the bank concerning any material change in my financial condition. I authorize you to obtain any information you may require, and agree that this application shall remain the property of this bank whether the loan is granted or not.

SIGNED: _____

Approved: _____
Date: _____
Person Advised: _____
Time Out: _____

I hereby authorize The First National Bank of Roseland to debit my account for payment of this account.

SIGNED: _____

Student Handout

APPLICATION FOR LOAN TO: THE FIRST NATIONAL BANK OF ROSELAND

Date:	Amount Wanted $ 2,000	Appl. Taken by:	Purpose of Loan: HOUSE REPAIRS

Name in Full (Last)	(First)	(Middle)	Age	Spouse's
JOHNSON	SUSAN	P.	40	LLOYD M. JOHNSON

Address: 1043 WASHINGTON AVE.	How Long: 5 YR.	Number of Children: 3

Buying (X) Rent ( ) Own ( ) Furn. ( ) Unfurn. ( )	Home Phone	Landlord or Mortgage Holder (Name & Address)

If Renting, Monthly Rent $	Mtg. Payments $ 165.00	Balance Owing $18,000	Previous address (if less than 5 years at present)	How Long

Previous Address (if less than 5 years established)	How Long

Employed by	Address of Employer	How Long
JONES PLUMBING	163 KELLOGG AVE.	6 YRS.

Position	Name & Title of Supervisor	Phone	Pay Day	Monthly Take Home Pay: 1,800.00
PLUMBER	BILL JENSEN	692-3643	WEEKLY	

Previous Employer	Address	Position	How Long
WHITE FURNITURE	603 NORTH KEEN	PLUMBER	2 YRS.

Other Real Estate Owned (describe) of Other Assets (describe)	Market Value	Mortgage Payments	Balance Owing
1969 PLYMOUTH	$1500	1st $ 30 2nd $	1st $ 550.00 2nd $

Bank with	Address of Bank	Checking (X) Savings ( )	Balance $ 500.00 Balance $	Acct. in Name of
1st NATIONAL	ROSELAND			SUSAN AND LLOYD JOHNSON

Life Insurance (Name of Company)	Beneficiary	Face Value	Policy Loans	Cash Value
ALLSTATE	HUSBAND	20,000	NONE	3850.00

Nearest Relative (First Name) (Initial) (Last)	Address	City	State	Zip
SUSAN A. BARTLETT	1043 WASH. AVE.	BLOOMINGTON	ILL.	6170

Trade References Payments Balance

Time In _____

Final Action _____

Approved ( ) Renewal ( )

Guaranteed ( ) Rejected ( )

No Liability

Remarks: _____

I hereby certify that the above statements are true and correct and are made to obtain a loan from this bank. I agree to notify the bank concerning any material change in my financial condition. I authorize you to obtain any information you may require, and agree that this application shall remain the property of this bank whether the loan is granted or not.

Approved: _____

Date: _____

Person Advised: _____

Time Out: _____

I hereby authorize The First National Bank of Roseland to debit my account for payment of this account.

SIGNED: _____

SIGNED: _____

Student Handout

APPLICATION FOR LOAN TO: THE FIRST NATIONAL BANK OF ROSELAND

Date:	Amount Wanted $1500.00	Appl. Taken by:	Purpose of Loan:

Name in Full (Last)	(First)	(Middle)	Age	Spouse's
JONES	MIKE	J.	21	—

Address: 201 ELM STREET	How Long: 1 YR.	Number of Children: 0

Buying ( ) Own ( ) Furn. ( ) Rent (X) Unfurn. (X)	Home Phone	Landlord or Mortgage Holder (Name & Address) B. THOMAS

If Renting, Monthly Rent	Mtg. Payments	Balance Owing	Previous address (if less than 5 years at present)	How Long
$ 150.00	$	$	1509 BROWN ST.	20

Previous Address (if less than 5 years established)	How Long

Employed by	Address of Employer	How Long
STUDENT	ILL. STATE UNIVERSITY	3 YRS.

Position	Name & Title of Supervisor	Phone	Pay Day	Monthly Take Home Pay:
STUDENT	—			0

Previous Employer	Address	Position	How Long
KROGER	CHICAGO	STOCKER	2 MONTHS

Other Real Estate Owned (describe) of Other Assets (describe)	Market Value	Mortgage Payments	Balance Owing
NONE		1st $ 2nd $	1st $ 2nd $

Bank with	Address of Bank	Checking (X) Balance $100.00 Savings (X) Balance $700.00	Acct. in Name of
JOLIET FEDERAL,	JOLIET		MIKE JONES

Life Insurance (Name of Company)	Beneficiary	Face Value	Policy Loans	Cash Value

Nearest Relative	(First Name)	(Initial)	(Last)	Address	City	State	Zip
FATHER	JOHN	F.	JONES	1509 BROWN ST.	JOLIET	ILL.	6040
MOTHER	MARTHA	E.	JONES				

Trade References	Payments	Balance

Time In_____

Final Action_____

Approved ( ) Renewal ( )

Guaranteed ( ) Rejected ( )

No Liability

Remarks:_____

I hereby certify that the above statements are true and correct and are made to obtain a loan from this bank. I agree to notify the bank concerning any material change in my financial condition. I authorize you to obtain any information you may require, and agree that this application shall remain the property of this bank whether the loan is granted or not.

SIGNED:_____

Approved:_____

Date:_____

Person Advised:_____

Time Out:_____

I hereby authorize The First National Bank of Roseland to debit my account for payment of this account.

SIGNED:_____

LEARNING ACTIVITY PACKAGE 9

Category: Marketing

Focus: Overview of Finance and Credit

Activity: Field Trip: Bank or Savings and Loan Institution

Objective: At the conclusion of this lesson, the student will be able to describe in narrative form some of the tasks, general working conditions, and skills needed for an occupation of his/her choice in finance and credit, as observed by the student during the field trip.

EQUIPMENT, SUPPLIES, AND FORMS

1. Field Trip Observation Form (see sample in the back of this notebook).
2. Bank skit student handout (enclosed in this package).

RATIONALE

The purpose of this lesson is to expose students to finance and credit jobs readily available in large cities, thus providing them with information and experience not normally available from the classroom teacher.

SUGGESTED PROCEDURE

Arrangements for a visit to a local bank or savings and loan institution should be made well in advance. The person you make the arrangements with should understand that you wish to have the emphasis of the trip on the jobs that are performed at the institution. You wish to see what tasks are performed, what type education or training is required, the beginning pay, responsibilities, advancement opportunities, benefits, desirable personal qualifications, etc.

The students should understand they are to write a paragraph describing the tasks, working conditions and skills of the finance and credit position which they have observed on the field trip. The description is to be written from the comments made on the observation form.

You may want to have the students present their writings as oral reports to the class.

ALTERNATE ACTIVITY

Manners, speech habits, and personality are important for banking and finance jobs, where employees are constantly dealing with the public. Have students in class role play the situation on the handout on the following page in groups until all have tried the roles. After each skit, ask the students to indicate how the behavior of the teller could have been improved. List all the faults and commendable behaviors on the board. After all have acted once, have some of the class re-enact the same situation using better techniques.

Setting: A bank in a large city.

Mr. Stover: Hello. How are you today? It sure is a beautiful day. Here are some checks I want cashed.

Teller: *(after looking at checks)* You forgot to endorse two of them. *(said rather gruffly)*

Mr. Stover: Oh, I'm sorry. Return them and I will endorse them. *(pause while he signs and hands them back)*

Teller: Now let's see if you signed all of them this time. *(said in monotone and gruffly)* All right, here is your money. Please don't forget to endorse the checks next time.

Mr. Stover: Now, I have to see your loan officer. Where is he located in this bank?

Teller: He's over in the office section of the bank.

Mr. Stover: Thank you.

SUGGESTED RESPONSE FOR STUDENT HANDOUT

FAULTY BEHAVIORS

1. The teller was rude to Mr. Stover because he had forgotten to endorse two checks.

2. The teller did not count out the money which Mr. Stover drew out, and he continued to be insulting in his comments.

3. The teller rudely gave directions for locating the loan officer.

LEARNING ACTIVITY PACKAGE 10

Category: Marketing

Focus: Overview of Insurance Industry

Activity: Film/Discussion

Objective: At the conclusion of this lesson, the student will demonstrate, by answering the assigned questions, his/her awareness of the jobs available in the insurance industry and related businesses.

EQUIPMENT, SUPPLIES, AND FORMS

1. Film: Is a Career in Finance, Insurance or Real Estate For You? Available on loan from: Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777.

2. Occupational Outlook Handbook.

RATIONALE

The purpose of this film is to show the student the nature of occupations in the areas of finance, insurance, and real estate.

SUGGESTED PROCEDURE

In the insurance industry it is not unusual for a person to be involved, to some degree, in the areas of finance, insurance or real estate. This is many times true of those people who work in local insurance agencies.

After having viewed the film Is a Career in Finance, Insurance or Real Estate for You? have the students answer verbally or on paper the following questions:

1. Name three occupations in finance, insurance, and real estate.
2. Who uses the services provided by people in these occupations?
3. What proportion of the men and women employed in these three fields deal largely with people—1/4, 1/2, or 3/4?
4. What do most of the others work with primarily?
5. Would you like to work in finance, in insurance or in real estate? As what? Why?
6. What education or training would you need?
7. What are the opportunities for advancement?
8. Is employment expected to increase in finance, insurance, and real estate?
9. Do you know anybody who is employed in one of these fields?
10. What do they think of it as a career area?

Evaluate the students' responses to the questions.

ALTERNATE ACTIVITIES

1. Appoint student committees to interview local employees in these occupational areas and have them report on local opportunities, earnings, and job conditions.

2. Assign students to read the section on finance, insurance, and real estate in the Occupational Outlook Handbook and report on the information that they obtain.

LEARNING ACTIVITY PACKAGE 11

Category: Marketing

Focus: Specialists in the Insurance Field

Activity: Speaker/Resource Person/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate, through completion of the resource person form, an awareness of the duties and responsibilities of specialists in the insurance field.

EQUIPMENT, SUPPLIES, AND FORMS

1. Resource Person Information Sheet (see sample in the back of this notebook).
2. Occupational Outlook Handbook.
3. Student exercise: Case Problem (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to expose students to specialists in the insurance industry. It provides students with an opportunity to meet and talk with someone dealing directly with the job(s) and to gain information and exposure not normally available in the classroom.

SUGGESTED PROCEDURE

Arrange for any of the following people from an insurance company to come to school and explain their jobs: personnel officer, actuary, underwriter, claim adjuster, or claim examiner.

If it is not possible to have a guest resource person, then discuss these jobs using the Occupational Outlook Handbook as your guide. You may wish to divide the students into groups, giving them copies of the information on insurance specialist positions from the Handbook and asking each group to discuss a specific job and then give an oral report to the class on their assigned job.

Areas that the groups should discuss which relate to the specific job include:

1. Nature of the work (include a simple example)
2. Places of employment
3. Training, other qualifications, and advancement
4. Employment outlook
5. Earnings and working conditions

STUDENT EXERCISE: CASE PROBLEM

Divide the class into small groups and have them discuss the case. Give each group a copy of the Rating Sheet for evaluation. When the evaluation has been completed, have a student from each group come to the front of the room to form a "panel of expert managers." Have this panel discuss the motivational techniques used for the six cases.

Suggestion: Draw a large evaluation form on the chalkboard. Fill in the form by a show of hands for each of the 10 motivational techniques. Ask individual students to give reasons for their choices.

CASE PROBLEM

1. Assume you are the vice president of Adams Insurance Company. For each of the cases discussed below, choose one of the following motivational techniques used by managers, and give reasons for your choice:

   A. consultive or participative techniques: you work with the individual in order to improve performance or change behavior.

   B. autocratic or authoritarian technique: you give orders to change behavior.

   C. free-rein technique: let the individual work out his/her problem with no interference from you.

2. List, in the order of their importance, two of the following conditions or inducements that you feel would motivate the individual in each case to greater performance (each inducement may be used twice):

   1. The threat of discharge
   2. A raise in salary
   3. More fringe benefits
   4. Less supervision
   5. More recognition for achievement
   6. More status—for example, title, own office
   7. A group profit-sharing plan
   8. An individual incentive plan
   9. More participation in managerial decisions
   10. Job enlargement—for example, opportunity for creativity, a wider range of activities

CASE A

Alan Brown is an office manager for your firm. He is 41, unmarried, and lives in a downtown apartment. He has been the office manager for three years, and earns $8,200 per year. He started as a general office clerk and has been with the company for 20 years.

CASE PROBLEM (CONT'D)

CASE B

Evelyn Gordon is your actuary specialist. She has a masters degree in statistics and has always been an extremely competent employee. She is 33, married, and has four children whose ages are 11, 8, 5, and 4. She is currently receiving $25,000 per year. She lives in a plush community near Chicago. Evelyn has been with the company for nine years and has been promoted twice to get to her present position.

CASE C

Jack "Red" Smith is an insurance investigator. He is 58 years old, widowed, and has three married children. His salary is $10,000 per year. He has been with your company for 11 years. Previously he worked for two other insurance companies—first as an investigator and then as a salesperson.

CASE D

Ava Ray is your West Coast sales manager. She was transferred two years ago from your Midwestern region where she was your salesperson in the Detroit office for two years. Before that she sold insurance for a major competing firm for three years. Her salary is $12,500 for her present job, while it was $11,000 for her previous job. She also gets a percentage on all the insurance sold in her area. Last year, this came to an additional $4,000 income. This was considerably more than she ever earned from this source as Midwestern sales manager. Ava is 36, married, and has three children who are 13, 11, and 8 years old. She lives in a large, rented house and pays a monthly rent of $250.

CASE E

Pat O'Brien is your personnel manager. He is 63, married, and has six grown children, four of whom are married. He started as an office worker, but his noticeable concern for human relations helped him achieve his present position. The company paid his way through graduate and postgraduate school, and he currently holds a doctoral degree in Industrial Psychology. He has been with the company for 31 years. His salary is $28,000 per year.

CASE PROBLEM (CONT'D)

CASE F

Claudia Freeberg is a beginning salesperson. Upon graduating from a midwestern college one year ago, she joined your company. She is 23, married, and has no children. Her present salary is $7,200.

RATING SHEET

	A	B	C	D	E	F
FIRST CHOICE						
SECOND CHOICE						

LEARNING ACTIVITY PACKAGE 12

Category: Marketing

Focus: Insurance

Activity: Field Trip/Game

Objective: At the conclusion of this lesson, the student will have viewed, first hand, jobs in an insurance office and will be able to demonstrate through completion of an observation form his/her awareness of the positions which he/she viewed.

EQUIPMENT, SUPPLIES, AND FORMS

1. Field Trip Observation Form (see sample in the back of this notebook).

RATIONALE

The purpose of this lesson is to give the students an opportunity to observe the jobs discussed in previous learning activity packages.

SUGGESTED PROCEDURE

When you set up the field trip, arrange to have people in various jobs stop their work and explain their job; and let the students ask them questions. Some of the jobs may include: underwriter, actuary, secretary, correspondence secretary, switchboard operator, microfilm machine operator, receptionist, officer, and others.

If you have advance information concerning occupations that will be seen, have the students list questions to be asked of the people in these jobs. Some suggested questions might be:

1. What are your duties and responsibilities?
2. What was the entry-level job for your career?
3. What made you choose this occupation over other possible occupations?

For additional questions see the list of interview questions at the back of this notebook.

In order to insure completion of the field trip, it will be necessary to budget the amount of time spent talking to people.

The students are to complete a Field Trip Observation Form based on those occupations which they view on the trip. A brief report may be assigned to be written from the comments made on the form.

OCCUPATIONAL PASSWORD

This is a game which helps students become familiar with the terms associated with an occupational area. It can easily be adapted to occupations other than insurance. Have the students prepare a list of one-word terms used by people in insurance occupations. The teacher selects important terms from the list prepared by the class. Each term is listed on two cards.

Divide the class into teams, two students on a team. Select an emcee, scorekeeper, and timekeeper.

Two teams come forward and seat themselves at the front of the room. The emcee gives a card containing the same term to one member of each team. These students alternately give one-word clues to their teammates. The timekeeper allows 20 seconds for each guess. The scorekeeper writes the number "10" on the chalkboard. One point is subtracted each time a wrong answer is given. When the correct answer is given, that team is awarded the remaining number of points.

The first team to reach 30 points wins the match. Once all the teams have had an opportunity to play, the winning team can continue to play until one team emerges victorious.

LEARNING ACTIVITY PACKAGE 13

Category: Marketing

Focus: Insurance Sales

Activity: Speaker/Resource Person: Insurance Salesperson/ Role Playing

Objective: At the conclusion of this lesson, the student will demonstrate, through participation in a role-playing activity, knowledge of what it is like to sell insurance.

EQUIPMENT, SUPPLIES, AND FORMS

1. Charts and tables used in selling insurance (obtain from resource person).

2. Resource Person Information Sheet (see sample included in the back of this notebook).

RATIONALE

The purpose of this activity is to demonstrate some of the aspects of selling insurance.

SUGGESTED PROCEDURE

This activity will require advance planning by the instructor and the students. Contact an insurance salesperson who will demonstrate some of the procedures used in selling insurance.

Using the information gained from the sales demonstration, and using charts, tables, etc., borrowed from an insurance agent, organize a role-playing situation.

Assign the students to role play various insurance sales situations, such as:

1. Automobile insurance for an 18-year-old car owner. Determine how much coverage is needed and what the premiums will cost.
2. A term or whole life policy for a person 55 years of age with a heart condition. How much would the premiums cost? What would the cost be if the person were in good health?

You can devise other situations which allow the student to use the charts and tables much as an insurance agent would when talking with a customer.

In each situation there should be one student acting as the agent and one or more students playing the role of customer. You may have each of the students participate in a sales situation or the class may observe while a situation is presented by the actors. The class may then critique the production in terms of how realistic it was to the occupation.

LEARNING ACTIVITY PACKAGE 14

Category: Marketing

Focus: Business and Job Identification

Activity: Walk

Objective: At the conclusion of this lesson, the student will be able to name, on a student worksheet, the different businesses in the immediate vicinity and will identify each type of business.

EQUIPMENT, SUPPLIES, AND FORMS

1. Business Identification Form (see sample enclosed in this learning package).

2. Telephone directories (in case of bad weather).

RATIONALE

Students are usually familiar with local businesses, but they cannot always identify the work these businesses do. This activity will give them experience in identifying local businesses and their work.

SUGGESTED PROCEDURE

Discuss the different types of businesses on the business identification form. They include: retail, bank, hospital, government, manufacturing, wholesale, transportation, and service.

The students should have a good understanding of the types of businesses that you want them to identify. You should be able to accomplish this by giving local or well-known examples of each type of business. Identification may be difficult and confusing without this information.

Take the students for a walk along a street populated with businesses. As you come to a business, stop and talk about how the business would be classified, the type of product it deals with, the type of workers it employs, and their duties.

If the school is too far from a heavily populated business area or the weather is bad, telephone directories may be used to find different businesses for each classification. Discuss each business listed as if you were visiting the business.

Student Handout

A - Banking
B - Manufacturing
C - Retail
D - Service
E - Governmental
F - Hospital
G - Wholesale
H - Transportation

BUSINESS IDENTIFICATION FORM

BUSINESS NAME	TYPE OF BUSINESS	TYPES OF EMPLOYMENT	COMMENTS

LEARNING ACTIVITY PACKAGE 15

Category: Marketing

Focus: Identification of Business and Job Locations

Activity: Constructing a Map of the Business Community

Objective: At the conclusion of this lesson, the student will be aware of the location of businesses throughout the local business district as a result of helping to construct a business community map.

EQUIPMENT, SUPPLIES, AND FORMS

1. Large wall map of the local business district (developed from a city map or drawn by the instructor).

2. Felt tip marking pens or colored map pins (eight different colors).

3. Reference materials:

   A. Telephone directory
   B. City directory
   C. City or area map
   D. Business directory (chamber of commerce)

RATIONALE

The students will be able to identify major occupational areas within the local geographical area. They will demonstrate their knowledge through class discussion and by constructing a map of the local business community.

SUGGESTED PROCEDURE

Through student-centered discussion, identify the different types of businesses which are located in your area, and obtain information from the students as to what types of workers they feel are demanded by these businesses. In this manner, major occupational areas of business, marketing, and management occupations should be identified and discussed. Divide the class into groups as follows:

Group 1 - Retail Stores	Group 5 - Manufacturing
Group 2 - Banks	Group 6 - Wholesale
Group 3 - Hospitals	Group 7 - Service
Group 4 - Government Buildings	Group 8 - Transportation

Assign each group to determine the location of businesses that fit into its classification. Each group is to pinpoint on the map the exact location of each business. This is to be done with a felt tip marker or map pins, using a different color for each group.

The map should be of a large wall type, developed from a city map or drawn by the instructor. The map, when completed by the student groups, will show a color-coded composite of the major occupational areas in your locality.

The student groups should, in addition to pinpointing business areas, develop a chart or key to the map which includes a listing of the types of workers employed by each type of business.

LEARNING ACTIVITY PACKAGE 16

Category: Office

Focus: Secretarial/Clerical

Activity: Discussion/Film

Objective: At the conclusion of this lesson, the student will be able to discuss the highlights of five clerical occupations that have been illustrated in the film.

EQUIPMENT, SUPPLIES, AND FORMS

1. Film: Is A Career in Clerical Work For You? (16 minutes). available on loan from: Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777.

RATIONALE

The purpose of this lesson is to introduce students to careers in clerical and office occupations through the use of a film.

SUGGESTED PROCEDURE

Introduce and show the film to the students. The film covers typists, stenographers, secretaries, bookkeepers, office machine operators, computer operators, cashiers, bank tellers, telephone operators, receptionists, shipping and receiving clerks, stock clerks, mail clerks, and mail carriers.

After having viewed the film, discuss the following questions:

1. What do clerical workers do?
2. What education or training do you usually need for a clerical job?
3. Where are clerical workers employed?
4. Is employment in clerical work increasing?
5. Are there opportunities for young people to gain practical experience while in high school?
6. Why is it important to start thinking about your career now?
7. What message is brought out in the ballad at the beginning and end of the film?

Discuss the following vocabulary words with the students:

career	facility	tabulate
communications	poise	bank deposits
minimum	accounting	tactful
dictation	ledger	predominantly

If time allows, view the film a second time, having the students list as many of the clerical jobs as they can find in the film. This film moves very rapidly, and a second showing can be worthwhile.

ALTERNATE ACTIVITIES

1. Prepare a slide presentation showing actual on-the-job activities of people in secretarial/clerical occupations.

2. Distribute to students a listing of job titles and descriptions in the secretarial/clerical area. Require each student to choose one occupation to explore via the job interview.

3. Role play various situations which secretarial/clerical people may find themselves confronted with from time to time, i.e., a cashier with a dissatisfied customer.

LEARNING ACTIVITY PACKAGE 17

Category: Office

Focus: Typist/Receptionist/Stenographer/Secretary

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will perform, on one or more student worksheets, some of the skills required of a typist, receptionist, stenographer, or secretary.

EQUIPMENT, SUPPLIES, AND FORMS

1. Occupational Outlook Handbook.
2. Student exercises: Typist, Receptionist, Stenographer, Secretary (see samples enclosed in this learning package).

RATIONALE

The purpose of this lesson is to expose students to jobs through which many young people start in an office career.

SUGGESTED PROCEDURE

Discuss in class each of the jobs (typist, receptionist, stenographer, and secretary) with the students. Use the Occupational Outlook Handbook description of each job to help you with the discussion.

Some of the students may have friends or relatives employed in one of these jobs and may be able to add personal comments on these jobs.

Have students complete the enclosed exercises to illustrate the type of work done by the people in these different occupations.

Evaluate the students' efforts and discuss with them the importance of selected skills to an office or organization.

TYPIST

DIRECTIONS

Can you put this letter into mailable form? You will need to know the meanings of some of the common proofreaders' marks. Rewrite the letter in corrected form.

___ Insert	___ Move Right	___ Transpose
___ Close Up	___ Move Left	___ Space
___ Delete	___ Capitalize	___ Paragraph

Mr. Herb Kennedy

Future Business Leaders to america

Madison Junior High School

Richmond, Ky. 58234 SPELL OUT

Dear Mr Kennedy

We will be glad to have you and your career club visit our office. We like to meet young people who are interested in office work

The month of April is a busy one fo our sch edule. If it can be convenient for you to plan your vist for May, we will look for ward to you visit than. Please complete the schedule form indicating which date you prefer.

Yours truly,

I R. Boss

RECEPTIONIST

As a receptionist for a group of 10 men and women, you received the six messages recorded below. Since you did not have a supply of telephone call forms, you wrote the messages out on a blank sheet of paper. You now transfer the messages to the telephone call memo forms that you have obtained so you can distribute them to the appropriate office desk. Complete the telephone call memo forms with the information supplied. After finishing with each one, answer the questions appearing below the memo call form regarding the completeness of the message.

11:05 a.m. - Mr. Edwards from Richmond Advertising Company, Atlanta, Georgia, called to discuss new advertising campaign. Wants you to call back. 549-1011

11:10 a.m. - Mrs. Crane called Mr. Crane. Changes have been made in plans for this evening - he should call home at about 2 p.m.

11:18 a.m. - Sam Joseph called Luann Larsen. Wants to talk about the advertising budget for next year. Mr. Joseph will call back; he is employed in the company's budget department.

11:25 a.m. - Ms. James of Graphic Display, Los Angeles, called Mr. Crane. Said she wanted to talk about the Benson Company's advertising layout.

11:45 a.m. - Mr. Widemaker called Mr. Joseph to determine when the advertising convention would be. Wants Mr. Joseph to call back. 584-0743

11:55 a.m. - Miss Samuels stopped to see Mrs. Stewart. She wishes to see her sometime tomorrow. Call to set time. Miss Samuels is head of personnel of the company. Her office is on the first floor.

MEMO CALL FORMS

To _____ Date _____

Time _____

WHILE YOU WERE OUT

M _____

of _____

Phone No. _____

Telephoned ____ Please Call Back ____

Called to see you ___ Will Call Again ___

Left the following message:

_____

_____

Taken by _____

Did you gain all of the necessary information? If not, what is missing?

_____

If you do not have all of the necessary information, what steps could you take to make the message more complete?

_____

To _____ Date _____

Time _____

WHILE YOU WERE OUT

M _____

of _____

Phone No. _____

Telephoned ____ Please Call Back ____

Called to see you ___ Will Call Again ___

Left the following message:

_____

_____

Taken by _____

Did you gain all the necessary information? If not, what is missing?

_____

If you do not have all of the necessary information, what steps could you take to make the message more complete?

_____

STENOGRAPHER

Sheila Benson, office manager, dictates a letter to Lydia Taylor, stenographer.

Sheila says:

Dear Mr. Parker:

As you requested on March 22, I am sending you a list of attitudes that are necessary for an office worker to succeed on the job.

Most personnel managers agree that all office workers must be loyal, dependable, cooperative, and tactful. They must be willing to follow instructions.

If we can help you in any other way, please let us know.

Yours truly,

INFORMATION UNLIMITED

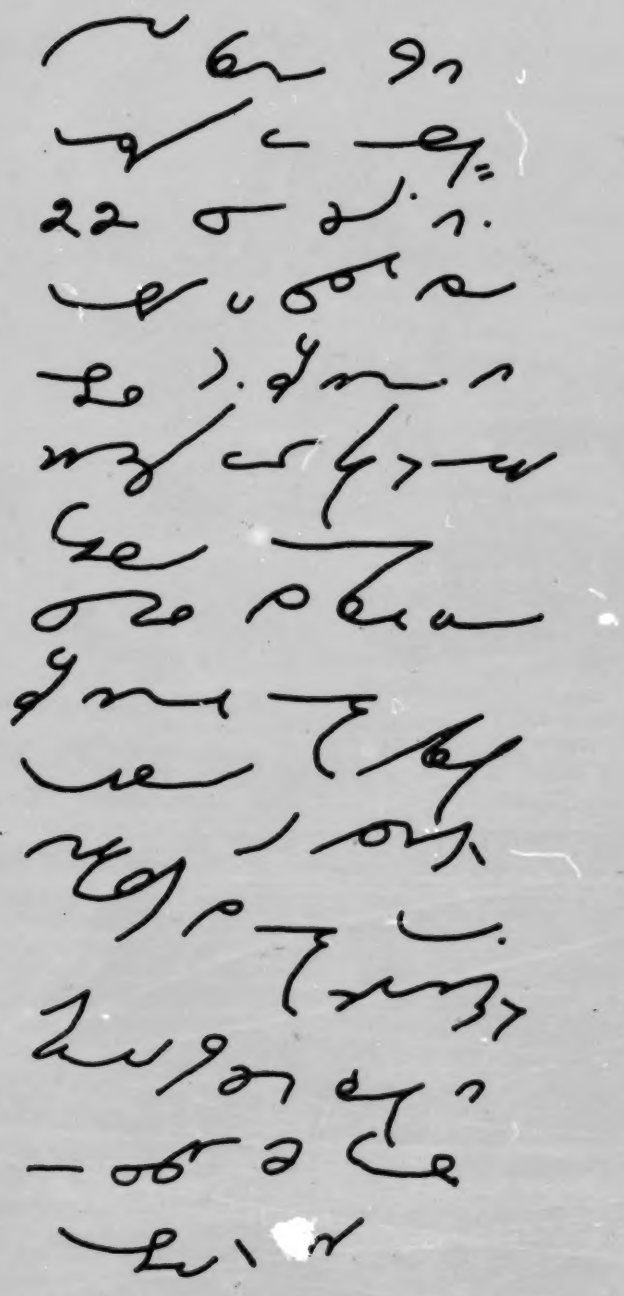
Sheila Benson, Office Manager

Lydia's shorthand notes appear on the following page.

Exploration: The student should be able to identify and write selected shorthand symbols.

STENOGRAPHER (CONT'D)

Lydia writes the words in shorthand as Sheila dictates them. Her shorthand notes look like this.



STENOGRAPHER (CONT'D)

DIRECTIONS: The entire letter—with the exception of some words which have been omitted—has been transcribed for you. The blank spaces indicate that a word has been omitted. Can you write the appropriate shorthand symbol by referring to the shorthand key on the following page? The first two underlines have been completed for you.

9 n requested _____ March 22, _____ _____ sending

_____ _____ list _____ attitudes that _____ necessary _____

_____ office worker _____ succeed on _____ job.

_____ personnel managers agree _____ _____ office workers

must _____ loyal, dependable, cooperative _____ tactful. They

must _____ willing _____ follow instructions.

If we _____ help _____ in any other way, please let us _____.

_____,

STENOGRAPHER (CONT'D)

Shorthand Key

Here is your reference for the shorthand symbol letter.

a, an		if		personnel	
agree		in		please	
all		instructions		requested	
am		job		sending	
and		know		succeed	
any		let		tactful	
are		list		that	
as		loyal		the	
attitudes		managers		they	
be		March		to	
can		most		us	
cooperative		must		way	
dependable		necessary		we	
follow		of		willing	
for		office		worker	
help		on		you	
I		other		yours truly	

SECRETARY

Mr. Jim Stewart is an executive secretary for Miss Donna Johnson, president of the Johnson Advertising Agency. Among his responsibilities is keeping an appointment calendar for Miss Johnson.

On the morning of June 26, Mr. Stewart was late due to a dental appointment. He had made prior plans for Miss Tomson to substitute for him until 9:00 a.m. This procedure was fine with Miss Johnson. She was not to arrive in the office until 10:00 a.m. When Mr. Stewart arrived at 9:00 a.m., the following messages had been taken:

8:15 - Mr. Ralph Edwards called to cancel his appointment due to illness.

8:20 - One of the vice-presidents of the firm, Mr. Simpson, stopped in to see Miss Johnson; wants to see her as soon as she comes in.

8:33 - A representative from Brighter View Land Development Company, Ed Stevenson, would like to see Miss Johnson this morning or early afternoon. Phone - 452-2722.

8:36 - Susan, a friend in the next office, wants to know if Jim would like to go to lunch.

8:40 - Miss Johnson called; wants you to retype speech on her desk that is to be given at Kiwanis Club.

8:45 - An emergency staff meeting has been called for 10:30, should last about one hour. Miss Johnson is to attend.

8:50 - Miss Johnson's brother called to ask Miss Johnson to be sure to pick up present at jeweler for his daughter, Julia.

8:54 - Mrs. Royce of Guenture Dry Cleaners called to set up an appointment for this afternoon. Please return call, 828-7086.

8:57 - Miss Johnson called; order some flowers for Mr. Grand who is in St. Therese's Hospital, Room 301. She just heard about his accident.

SECRETARY (CONT'D)

The calendar for Miss Johnson for June 26 is as follows:

10:00 - Mr. Ralph Edwards

10:30 -

11:00 - Mrs. Sam Smedsted

11:30 -

12:00 - Lunch and speak at Kiwanis Club (12-2)

12:30 -

1:00 -

1:30 -

2:00 -

2:30 -

3:00 - Work on layout for new ad (3 - 5)

3:30 -

4:00 -

4:30 -

5:00 -

Instructions: Imagine you are doing the work for Mr. Stewart. Do the following activities:

1. Rearrange Miss Johnson's appointment calendar. Cross out and write above deleted item when necessary.

2. Write, on a separate sheet of paper, any other notes to Miss Johnson that you think are necessary besides the change in appointments.

3. Indicate in chronological order on a separate sheet of paper what activities Mr. Stewart should perform after arriving at 9 a.m.

SUGGESTED RESPONSE TO SECRETARY HANDOUT

10:00 - Mr. Ralph Edwards-

10:30 - Emergency Staff Meeting

11:00 - Mrs.-Sam-Smedsted cancel due to staff meeting

11:30 -

12:00 - Lunch and speak at Kiwanis Club (12 - 2)

12:30 -

1:00 -

1:30 -

2:00 -

2:30 -

3:00 - Work on layout for new ad (3 - 5)

3:30 -

4:00 -

4:30 -

5:00 -

Notes to Miss Johnson:

1. Mr. Simpson wants to see you as soon as you arrive.
2. Call Ed Stevenson of Brighter View Land Development Company this morning or early afternoon. 452-2722.
3. Pick up present for Julia at jeweler.
4. Mrs. Royce wants to set up appointment for this afternoon. Call to set appointment. 828-7086.

Chronological Order of Activities Performed by Mr. Stewart after arrival:

1. Rearrange appointment calendar and write separate notes to Miss Johnson concerning matters she must take care of after arrival.

SUGGESTED RESPONSE TO SECRETARY HANDOUT (CONT'D)

2. Phone Mrs. Smedsted to inform her of cancellation of 11 a.m. appointment due to emergency staff meeting.
3. Order flowers to be sent to Mr. Grand.
4. Make a quick call to Susan to confirm luncheon date.
5. Retype speech.

LEARNING ACTIVITY PACKAGE 18

Category: Office

Focus: File Clerk/Office Machine Operator

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate a general understanding of the file clerks' and office machine operators' jobs by producing a spirit master and completing a filing project.

EQUIPMENT, SUPPLIES, AND FORMS

1. Enough of the following for each class member:
   A. Spirit masters
   B. Student exercise: File Clerk (see sample enclosed in this learning package)
   C. Paper for duplication
   D. Ditto
2. Occupational Outlook Handbook

RATIONALE

The purpose of this lesson is to expose students to the basic filing rules, in order to give them a better idea of the skills needed by a file clerk. The preparation of a spirit master will introduce the students to one process of making duplicate copies.

SUGGESTED PROCEDURE

Using information from the Occupational Outlook Handbook, discuss with the students the positions of office machine operators and file clerks.

After discussing these occupations with the students, allow them time to start their student exercises.

Have each student produce a spirit master either by typing, writing, or drawing on the spirit master. Some suggestions are career-oriented illustrations, typed or written letters, poems, and tracings such as drawings of cartoons or illustrations from coloring books or newspapers. The students should reproduce five to 10 copies of their spirit master on the duplicator.

Some other office machines which you may wish to demonstrate are: mimeograph, offset press, copier, adding machine, billing machine, addressing machine, etc.

Have the students complete the filing exercise. Evaluate this exercise and discuss the importance of filing occupations in an office.

FILE CLERK

DIRECTIONS

The secret to filing is "finding" not just "putting away." In this exercise you will prepare names for filing by indexing and sorting. After you have learned these steps in filing, you will prepare and file Student Identification Cards.

Turn the page and begin.

FILE CLERK (CONT'D)

FILING RULES

INDEXING

In order to place the names of people in proper filing order, it is necessary to break the names down into units by following a set of rules. This is called indexing.

Rule One: Arrange a person's name for filing by printing his/her last name first (Unit 1), first name second (Unit 2), and middle name or initial third (Unit 3).

Example:

Name	Unit 1	Unit 2	Unit 3
Howard R. Brown	Brown	Howard	R.

Rule Two: When two persons have the same last name, the first name (Unit 2) will determine the filing order.

Example:

Name	Unit 1	Unit 2	Unit 3
James Allen Mason	Mason	James	Allen
Laura Miller Mason	Mason	Laura	Miller

Rule Three: When both the last name and the first name of two people are the same, the middle name (Unit 3) determines the filing order. If both middle names start with the same letter, but one is a full name and the other is an initial, the initial comes first.

Example:

Name	Unit 1	Unit 2	Unit 3
Mary J. White	White	Mary	J.
Mary Jane White	White	Mary	Jane

Rule Four: Prefixes in the last name (Mc, Mac, De) are considered as part of the last name (Unit 1) and are not considered a separate filing unit.

Example:

Name	Unit 1	Unit 2	Unit 3
Janet McMurtry	McMurtry	Janet	-

FILE CLERK (CONT'D)

FILING EXERCISE

DIRECTIONS

Arrange the following list of names by units in the correct filing order.

Example:

Name	Filing Order
Howard B. Jones	Jones, Howard B.

Name	Filing Order
1. Thomas A. Doyle	_____
2. Sue Ellen Mason	_____
3. David Ray Murphy	_____
4. Louis J. Moore	_____
5. Tina Henry Moore	_____
6. Patricia Ryan Moore	_____
7. James T. Walker	_____
8. James Taylor Walker	_____
9. Fay L. LeLaine	_____
10. Kenneth T. MacDonald	_____
11. Joan C. McMurtry	_____

LEARNING ACTIVITY PACKAGE 19

Category: Office

Focus: Accountant/Bookkeeper

Activity: Discussion/Student Exercises

Objective: At the conclusion of this lesson, the student will be able to complete the student exercises representing the skills needed for the jobs of bookkeepers and accountants.

EQUIPMENT, SUPPLIES, AND FORMS

1. Student Exercises: Accountant, Bookkeeper (see samples enclosed in this learning package).
2. Occupational Outlook Handbook.

RATIONALE

Many office jobs require a knowledge of bookkeeping principles. The purpose of this lesson is to provide the students with an idea of what it would be like to be a bookkeeper or an accountant.

SUGGESTED PROCEDURE

Discuss with the students the positions of bookkeeper and accountant. Ask them to name businesses that employ bookkeepers or accountants.

Some points of the discussion that might be considered are:

1. If you worked in these positions would you be more likely to work with people or things?
2. Are accountants and bookkeepers always busy or do they have heavy work schedules during certain times of the year?

Use the Occupational Outlook Handbook descriptions of these positions to help you with the discussion.

The students are to complete the exercises for bookkeeper and accountant. It should be explained that these exercises are not for the purpose of learning the skills but are representative of the type of work done by people in these occupations.

Evaluate the students' work and discuss the place and importance of these skills in an office.

ACCOUNTANT EXERCISE

Imagine you are an accountant for the Reynolds Company. An accountant does sorting and arranging of items by daily transaction. Below is a list of categories (or accounts) followed by 11 transactions. What accounts would be increased and decreased by each transaction?

ACCOUNTS:

A. Cash
B. Amounts owed by people (Accounts Receivable)
C. Office Furniture
D. Office Machines
E. Office Supplies
F. Amounts owed to people (Accounts Payable)
G. Insurance Expense
H. Rent Expense

		Account Increased	Account Decreased
June 1, 1972	Paid the rent for June.		
June 3,	Paid cash for office furniture.		
June 4,	Paid insurance premium for June.		
June 5,	Bought office machines from Jones Machine Supply on credit.*		
June 8,	Received $500 from Jake that he had owed to you since last year.		
June 11,	Paid cash for office supplies.		
July 1,	Sold office furniture to Carla Smith but will receive no money from Carla until next year.		
July 5,	Paid insurance expense for July.		
July 7,	Purchased office supplies for cash.		
July 8,	Paid cash to Jake Small that you had owed to him since last month for office furniture.		

*Teacher may need to explain "credit" to students.

ANSWER KEY FOR ACCOUNTING EXERCISE

	Account Increased	Account Decreased
June 1, 1972	Rent expense	Cash
June 3	Office Furniture	Cash
June 4	Insurance expense	Cash
June 5	Office machines (Accounts payable)	----
June 8	Cash	Accounts receivable
June 11	Office supplies	Cash
July 1	Rent expense	Cash
July 2	Accounts receivable	Office furniture
July 5	Insurance expense	Cash
July 7	Office supplies	Cash
July 8	----	Cash (Accounts payable)

BOOKKEEPER EXERCISE

INSTRUCTIONS FOR PART A

Bookkeepers in payroll departments have several tasks that concern payroll. Many bookkeepers determine the gross pay of salespeople from a percent of total sales. Federal and state taxes, in addition to deductions such as medical insurance, are then subtracted from gross pay, to determine net pay.

Figure the gross pay for each salesperson during the first two weeks of April. Using the gross pay for each salesperson figure the net pay for each if:

Salesperson	Sales	Gross Pay 20% Commission	Deducations Federal & State Taxes	Net Pay
Betty Allen	$1,063.09		$25.00	
Jack Thompson	$1,554.11		$30.00	
Martha Carter	$1,000.20		$23.50	

INSTRUCTIONS FOR PART B

Use the net pay for each salesperson during the first two weeks of April to prepare the following checks. Use your own signature as treasurer. Checks are either typewritten or written in ink.

The L-Mart
Elmwood, Illinois 61102 Date_____

Pay To The
Order of_____ $_____

_____ Dollars.

Payroll Account
First National Bank of Elmwood
Elmwood, Illinois 61102

_____
Treasurer

0711- 0756

BOOKKEEPER EXERCISE (CONT'D)

The L-Mart
Elmwood, Illinois 61102 Date_____

Pay To The
Order of_____$_____

_____Dollars.

Payroll Account
First National Bank of Elmwood
Elmwood, Illinois 61102

_____
Treasurer

0711 - 0756

The L-Mart
Elmwood, Illinois 61102 Date_____

Pay To The
Order of_____$_____

_____Dollars.

Payroll Account
First National Bank of Elmwood
Elmwood, Illinois 61102

_____
Treasurer

0711 - 0756

ANSWER KEY TO BOOKKEEPER EXERCISE

Salesperson	Gross Pay	Net Pay
Betty Allen	$212.62	$187.62
Jack Thompson	$310.82	$280.82
Martha Carter	$200.04	$176.54

Sample Form:

The L-Mart
Elmwood, Illinois 61102

Date April 15, 1972

Pay To The
Order of John L. Jones $187.62/100

One hundred eighty seven and 62/cents---------- Dollars

Payroll Account
First National Bank of Elmwood
Elmwood, Illinois 61102

John Adams
Treasurer

0711 - 0756

LEARNING ACTIVITY PACKAGE 20

Category: Office

Focus: Secretarial/Clerical Office Equipment

Activity: Trip to Office Production Room

Objective: At the conclusion of this lesson, the student will be able to demonstrate knowledge of some of the equipment that a secretary and/or a clerical worker may use on the job, and will be able to name the equipment and briefly describe in writing its use.

EQUIPMENT, SUPPLIES, AND FORMS

1. Office practice classroom and equipment, i.e., typewriter, calculator, keypunch machine, duplicating machine, transcribing unit, etc.

RATIONALE

The purpose of this lesson is to introduce students to the various types of equipment used in secretarial or clerical careers.

SUGGESTED PROCEDURE

Explain the various pieces of equipment to the students, describing the name of each piece, its function, how it is used, and the jobs of those people who might be using the equipment.

If you need information about the equipment to help with the explanation, see the business or office practice instructor. Also, you may refer to textbooks in the business field.

After having provided explanations on using the equipment, allow the students to experience operating each machine. Have them do a brief exercise which has been prepared for each type of machine.

ALTERNATE ACTIVITY

1. Show the filmstrip and cassette tape, Basic Office Machines, Eye Gate House, 146-01 Archer Avenue, Jamaica, N.Y. 11435.

2. Assign students to research, through the use of local businesses, manufacturer's product catalogs, or general merchandise catalogs, the various brands, types, general specifications, and costs of a variety of business machines that could be used in an office.

LEARNING ACTIVITY PACKAGE 21

Category: Office

Focus: Administrative and Related Occupations (Public Relations/Personnel Positions)

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate, through class discussions and completion of student exercises, some of the types of decisions made by people in personnel positions and be aware of the contributions made by those in public relations to their companies.

EQUIPMENT, SUPPLIES, AND FORMS

1. Student exercise: Hit Parade Record Company (see sample enclosed in this learning package).
2. Occupational Outlook Handbook.
3. Student exercise: Personnel Manager (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to introduce students to decisions that personnel officers have to make and to provide an awareness of occupations in the field of public relations.

SUGGESTED PROCEDURE

Discuss with the students what personnel officers and public relations people do in their jobs. Explain some of the ways that public relations people present a favorable image of their company to the public: announcements of promotions, length of service, safety awards, and community involvement by company or individual employees.

It would be desirable to assign students to find examples of people in public relations promoting the image of their company. This can be done by reading newspaper accounts, observing radio and television spots, or researching trade journals.

Discuss with students the nature of work done by personnel workers. This discussion can be based on information gained from the Occupational Outlook Handbook. One of the major responsibilities that faces a personnel officer is that of hiring and recommending applicants to fill vacancies. With this in mind, have the students complete the student exercises included in this lesson.

Although there are answers that could be considered right or wrong in this exercise, it is more important to consider the reasons students give for selecting people to fill these positions.

HIT PARADE RECORD COMPANY

Situation:

Mr. Hanson, a personnel interviewer for the Hit Parade Record Company has interviewed and reviewed the past performance of four applicants for a secretarial position. The person selected will be working for Ted Granger, who is rather temperamental. An ability to take shorthand and to type are essential for this position. All four applicants are presently employed in the firm.

Instructions:

After studying the data on each applicant, indicate which one of the four you would recommend to the personnel manager for promotion to the secretarial position. Give reasons for your choice.

Miss Jill Smock

Presently working as clerk-typist.
Has excellent typing and shorthand ability as shown on tests.
Has a fiery temper at times.
Supervisor is pleased with her performance as clerk-typist.
Relates well to people.
Very alert at interview; seems to be quite ambitious.

Mrs. Jo Anne Small

Presently working as clerk-typist.
Has average typing ability; no shorthand ability.
Seems quite personable.
Pleasing personality; even disposition.
Did not seem secure at interview; was exceedingly nervous.
Present supervisor is pleased with her performance, except that she has missed several days due to sickness.

Mr. John Truman

Presently working as bookkeeper.
Has excellent typing and shorthand skills.
Is quite independent; generally works alone and not with other bookkeepers.
Seems to be quite brilliant with figures.
Has quiet disposition.
Seems ambitious in his own quiet way.
Said very little during interview.

HIT PARADE RECORD COMPANY (CONT'D)

Mrs. Sarah Bunco

Has been a file clerk in firm for five years.
Has average typing and shorthand skills.
Supervisor reports that she does a fine job of filing.
Likes to gossip.
Seems quite confident at interview.
Has good disposition.
Does not seem to be very ambitious.

SUGGESTED RESPONSE FOR CASE STUDY

HIT PARADE RECORD COMPANY

None of the candidates has the "perfect" qualifications, which is a fairly typical situation. Miss Smock has the necessary skills, but there is a question of how well she could work with temperamental Mr. Granger due to her fiery temper. Mrs. Small has no shorthand ability and has been absent from work too many days. There is a question of whether Mr. Truman could work closely with another person since he has not done so in his bookkeeping position. Meeting people might also be difficult for Mr. Truman due to his quiet disposition. Mrs. Bunco's main handicap is her gossiping; the confidential nature of matters handled by Mr. Granger might be discussed with others by Mrs. Bunco. Both Mr. Truman and Mrs. Bunco might be better able to work overtime because of no family responsibilities.

If possible, recommend that more candidates be interviewed for the position. If this is not possible, Miss Smock seems to be the best choice, if she can better control her temper. A second choice might be Mrs. Bunco; however, the importance of keeping information confidential must be made very clear to her before she assumes the position.

PERSONNEL MANAGER

Exercise:

Using the 10 application forms included for this exercise, divide the class into groups of three to four students. Have the students assume the role of a personnel manager who will be hiring people to fill the following positions: (1) floor sweeper (janitor); (2) management trainee; (3) bookkeeper; (4) salesperson; (5) cashier. Have students estimate the skills needed for each position, and then have them screen each application to find the best person to fill each position. Reasons should be given why each choice was preferred over another.

Have a student from each group write his/her answer on the chalkboard, and have each discuss reasons for their choice.

Suggestions for Teachers:

An important task for personnel managers is to select the right person for the right job. This exercise will help students match personal qualifications to job requirements.

In addition to the groups of personnel managers, you may want to select 10 students to be job applicants and allow time for the personnel managers to interview each applicant.

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name_____ Soc. Sec. No._____

Address_____ Date_____

_____ Telephone_____

Position Applied for_____ Birth Date_____

Record of Work Experience: Last two positions

Date of Employment		Name & Address of Company	Type of Work	Reason for Leaving
From	To			

Height _____ Weight _____ Married _____ Single _____

Separated_____ Widowed_____ Divorced_____

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 2 3 4

Other_____

Year_____

Were you ever employed by Frederick & Nelson_____

When?_____

Signature_____

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name June Beal Soc. Sec. No. 312-64-8630

Address 222 Hovey, Normal, Ill. Date

Telephone 452-6304

Position Applied for Birth Date 5/20/47

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
8/64	5/67	CAMPUS BOOK STORE NORMAL, ILL	SALES	TO OBTAIN BETTER JOB
5/67	6/72	SEARS BLOOMINGTON, ILL	ASST. BUYER	STILL EMPLOYED

Height 5'8" Weight _____ Married _____ Single X

Separated _____ Widowed _____ Divorced _____

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 (2) 3 4

Other Jr. College

Year 1967

Were you ever employed by Frederick & Nelson _____

When? _____

Signature June Beal

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PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Robert Burns Soc. Sec. No. 152-42-2924

Address 163 University, Pontiac, Ill. Date

Telephone 844-6321

Position Applied for Birth Date 6/21/47

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
7/69	7/72	U.S. ARMY	CLERK TYPIST	DISCHARGE
8/67	6/69	AGP PONTIAC	STOCKER	ENLISTED

Height Weight Married X Single

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 2 3 4

Other

Year 1969

Were you ever employed by Frederick & Nelson No

When?

Signature Robert Burns

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PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name NANCY BITTLE Soc. Sec. No. 294-15-3002

Address 102 College, Apt. A Date

NORMAL, ILL Telephone NONE

Position Applied for Birth Date 9/7/54

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
			BABYSITTING	
6/70	PRESENT	J.C. PENNEY CO.	SALES CLERK	

Height 5'6" Weight 120 Married Single X

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 2 3 4

Other

Year 1970

Were you ever employed by Frederick & Nelson

When?

Signature Nancy Bittle

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PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Janet Goodwin Soc. Sec. No. 340-72-5470

Address 514 Willow Date

Telephone 452-9172

Position Applied for Birth Date 2-15-53

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
3/68	5/71	HIGH SCHOOL BOOKSTORE	EVERYTHING	GRADUATED
SUMMER 70,71		CITY POOL	LIFEGUARD	
			BABYSITTING	

Height 5'6" Weight 125 Married X Single

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 (4)

College 1 2 3 4

Other

Year 1971

Were you ever employed by Frederick & Nelson

When?

Signature Janet Goodwin

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Neal Cashman Soc. Sec. No. 209-72-3941

Address 15 Locust Date

Bloomington, Ill. Telephone 452-7743

Position Applied for Birth Date 3/11/25

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
1/57	4/62	A.B.C. Janitor Service	Janitor	Better Job
4/62	6/72	Jiffy Janitor Service	"	

Height 5'11" Weight 165 Married Single X

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 (2) 3 4

College 1 2 3 4

Other

Year 1941

Were you ever employed by Frederick & Nelson

When?

Signature Neal Cashman

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PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Billy Cold Soc. Sec. No. 358-51-4271

Address Falcon motel, Normal Date

Telephone

Position Applied for Birth Date 7/20/50

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
6/69	6/71	U.S. ARMY	MECHANIC	DISCHARGED
1/72	8/72	Bob's Used Cars	Sales	

Height 5'6" Weight 135 Married X Single

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 (2) 3 4

College 1 2 3 4

Other

Year 1968

Were you ever employed by Frederick & Nelson

When?

Signature Billy Cold

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Rita Hamlin Soc. Sec. No. 358-44-5644

Address 18 WARREN AVE. Date

Telephone 452-7248

Position Applied for Birth Date 11/21/47

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
Sum 67		BILL'S DRUG STORE	ASST B. Keeper	
5/68	4/70	U.S. Army	Finance	Discharge
5/70	6/72	F.W. Woolworth	MGT TRAINING	

Height 5'10" Weight 155 Married Single X

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 (2) 3 4

Other

Year 1968

Were you ever employed by Frederick & Nelson

When?

Signature Rita Hamlin

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name Joann Frederick Soc. Sec. No. 247-50-7897

Address 147 Pine St., Normal Date

Telephone 452-1972

Position Applied for Birth Date 4/19/48

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
6/69	6/72	Bob's Hardware	Sec/Bookeeper	CHANGE JOBS

Height 5'5" Weight 115 Married X Single

Separated Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 (2) 3 4

Other

Year 1969

Were you ever employed by Frederick & Nelson

When?

Signature Joann Frederick

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PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name John Smith Soc. Sec. No. 621-47-0012

Address 2724 Plymouth Date

Springfield, Ill. Telephone 783-1190

Position Applied for Birth Date 8/11/49

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
6/69	6/72	U.S. ARMY		DISCHARGED
9/67	5/69	SEARS	SALES	ENLISTED

Height 6'2 Weight 180 Married Single

Separated X Widowed Divorced

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 (2) 3 4

Other

Year

Were you ever employed by Frederick & Nelson NO

When?

Signature John Smith

PERSONNEL MANAGER

Frederick & Nelson

APPLICATION FOR EMPLOYMENT

Name PETER OLSEN Soc. Sec. No. 137-42-1940

Address 19 SMYTH Date

NORMAL, ILL Telephone 523-2743

Position Applied for Birth Date 11/27/39

Record of Work Experience: Last two positions

Date of Employment From	To	Name & Address of Company	Type of Work	Reason for Leaving
6/61	6/64	U.S. ARMY	1ST LT.	DISCHARGED
8/64	10/67	K-MART	MGT. TRAINING	MORE MONEY
11/67	6/72	B.F. GOODWILL CO.	SALEMAN	BETTER JOB

Height 5'10" Weight 175 Married Single

Separated Widowed Divorced X

Circle highest grade completed 6 7 8 High School 1 2 3 4

College 1 (2) 3 4

Other

Year

Were you ever employed by Frederick & Nelson NO

When?

Signature Peter Olsen

LEARNING ACTIVITY PACKAGE 22

Category: Office

Focus: Office Occupations with the Telephone Company

Activity: Speaker/Resource Person

Objective: At the conclusion of this lesson the student will be able to demonstrate, through completion of a resource person form, for each job discussed an awareness of various job opportunities and requirements for employment with a telephone company.

EQUIPMENT, SUPPLIES, AND FORMS

1. Resource Person Information Sheet (see sample in the back of this notebook).

2. Description of job of telephone company customer service representative (obtain from local telephone company business office).

RATIONALE

In many communities the telephone company offers a variety of jobs, advancement opportunities, good wages and working conditions, and on-the-job training. The students should be aware of these facts. This lesson gives them an opportunity to gain information directly from someone familiar with these jobs.

SUGGESTED PROCEDURE

Public relations people for the telephone company are aware of company personnel who are willing to be resources to schools. They can help you arrange for a resource person and give you ideas on topics that can be discussed in class.

When making arrangements with the telephone company, it is important to remember that it employs people in positions other than office and clerical. The resource person should be knowledgeable about various office and clerical positions and be able to provide information and facts on such things as education and training, salary, advancement, etc. Your resource person also should be able to illustrate the relationship between office positions and other jobs within the company.

The students should complete the Resource Person Information Sheet for each type of position that the resource person introduces. To prevent distraction, it may be desirable to have the students complete these forms at a later date based on their notes taken during class.

If you are not able to obtain a resource person from the phone company you may be able to acquaint students with many of the positions by using employment brochures and a listing of office and clerical positions for which the company hires people.

ALTERNATE ACTIVITY

An important office job in the telephone company is customer service representative. A person in this job usually works in a telephone company local business office handling applications for new telephones and complaints and questions about existing telephone service. Obtain a description of the work done by customer service representatives from your local telephone company business office. Ask students in class to describe what they think are important qualifications for this job. Then give them the official description of the job. Ask them to list possible requests, complaints, and questions that a representative would encounter. Then have students role-play situations involving some of these requests, complaints, and questions.

LEARNING ACTIVITY PACKAGE 23

Category: Office

Focus: Telephone Company Operator

Activity: Film/Role Playing

Objective: At the conclusion of this lesson, the student will be able to list the various equipment used by a telephone operator and to describe in writing some of the advantages and disadvantages of this position.

EQUIPMENT, SUPPLIES, AND FORMS

1. Film: Operator (16 minutes) available free from: Illinois Bell Telephone Company, Public Relations Department, 406 East Monroe Street, Springfield, IL 62701.

RATIONALE

This lesson exposes students to an occupation with which nearly everyone, even the youngest child, has contact. The telephone operator serves an important function in any community. This lesson will display some of the equipment used and highlight the advantages and disadvantages of this position.

SUGGESTED PROCEDURE

The film Operator deals with the job as it relates to employment with the telephone company. This job serves as a vital link in communications for people in time of emergencies as well as in our everyday use of the telephone.

Show the film. Instruct the students to be aware of special equipment, i.e., headsets, special pencils, boards (lights), keys, pushbuttons, etc., with which the operator works. Note also that men are employed as operators as well as women.

Discuss with your students the highlights of the film. Be sure that time is spent considering the disadvantages as well as the advantages of this occupation.

Divide the class into groups of two students each and role play the following situations. The students who are playing the parts of operator and caller should try to react as realistically as possible:

Situation A: A young child calls the operator to get help for her mother who has been knocked unconscious from a short circuit in the electric stove. The child is very upset. What should the operator do?

Situation B: An elderly person who has poor eyesight calls the operator rather than directory assistance to obtain the number of a department store. How would a good operator handle this?

Situation C: The caller wishes to place a person-to-person call with a party in New York City. What information does the operator need?

Situation D: The operator receives a call from a dissatisfied customer. What should the operator do?

You may want to devise other role-play situations or allow the students to devise their own.

Evaluate student knowledge of these operations by having them list the equipment necessary and describe in writing what they feel to be the advantages and disadvantages of this occupation.

LEARNING ACTIVITY PACKAGE 24

Category: Office

Focus: Telephone Company Service Representative/ Directory Assistance Operator

Activity: Field Trip/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate by completing an observation form his/her familiarity with the work of a service representative and a directory assistance operator.

EQUIPMENT, SUPPLIES, AND FORMS

1. Field Trip Observation Form (see sample in the back of this notebook).
2. Student exercises: Telephone Directory, Switchboard Operator (see samples enclosed in this learning package).
3. Copies of the local telephone directory.

RATIONALE

The purpose of this lesson is to expose students to the jobs of service representative and directory assistance operator, by providing them with the opportunity to talk with people working in these jobs.

SUGGESTED PROCEDURE

Explain to the person with whom you set up the field trip that you wish to concentrate on the particular jobs of service representative and directory assistance operator. The qualifications needed to get the jobs, the work performed, chances for advancement, pay and benefits, and personal characteristics needed to succeed in the particular job are points which should be covered when reviewing these positions.

Request that the students be allowed to interview and talk with the people working in the positions.

Upon arrival to the location of the field trip, remind the company person in charge of the tour of exactly what your objective is for the day. If time is available after concentrating on the occupations of service representative and directory assistance operator, try to observe some of the other jobs necessary for the phone company to function.

Evaluate the field trip by having the students complete the observation form. Then lead a class discussion of the relationships of the jobs in the phone company.

The student exercise, Telephone Directory, is to provide students with an opportunity to become more adept at using the telephone directory. It should be noted to the students that their ability to properly use the directory will help to make the directory assistance job easier.

ALTERNATE ACTIVITIES

1. The Switchboard Operator is an exercise which introduces students to an all too common problem in our working society today. Have each student read the handout and briefly respond in writing to the three questions which are asked. A list of suggested student responses is included to aid you in discussing or evaluating the questions.
2. Have the students research the occupations of telephone service representative and directory assistance operator using the Occupational Outlook Handbook or a similar reference.

TELEPHONE DIRECTORY

Instructions:

Most office workers need to know how to use the telephone directory because of their frequent use of the phone. Receptionists and switchboard operators must be adept at using the telephone directory. Answer the following questions by using a telephone directory.

1. What are the telephone numbers for your local fire department and police department? Where did you find these numbers?
2. What number do you dial for the service department of your telephone company? Where did you find it?
3. Suppose you wanted to direct dial a friend in Los Angeles whose phone number is 738-2426. What numbers would you dial?
4. What would a three-minute call to your friend in Los Angeles cost if you dial direct at 11 a.m.? Would the cost be different if you placed the call at 11 p.m.? If your answer is yes, what would be the difference?
5. What are the area codes for Chicago, New York City, San Francisco, Washington, DC, and Philadelphia?
6. Your boss has a business associate by the name of Robert E. Smith who lives in town. You are to place a call to Mr. Smith for your boss. You look in the directory for his number and find that there are two listings for Robert E. Smith, indicating there must be two men with the same name. What additional information do you need to determine the number of the Robert E. Smith whom you want to call?
7. Your boss wants to know if there is a taxidermist in the area. Would the telephone directory be of help in answering her question? Explain.
8. You are looking for a typewriter repair person because your typewriter is not working correctly. Under what heading in the yellow pages would you look for the number of a repair person?
9. What heading in the yellow pages would you look for to find the medical doctors in town?
10. Where would you look in the directory for the number of the local post office? Under what title is it listed?

SWITCHBOARD OPERATOR

Dolores, a switchboard operator at the telephone company, leaves her office station at 4:50 p.m. every day to get ready to check the time clock and to depart for home. Her friend, James, does not leave his station until 5:00 p.m. but realizes that Dolores does not work up to quitting time. One day, James overheard Dolores' supervisor complaining to another supervisor about how Dolores seems to leave early in order to check her makeup and hair before punching the time clock at 5:00 p.m.

1. Do you believe James should mention what he overheard to his friend, Dolores? Why or why not?

2. If you were the supervisor, would you reprimand Dolores privately or in front of other operators? Explain why.

3. When Dolores is reprimanded, she says that she could not help it because "her boyfriend has to pick her up right at 5:00 so that he can take her home and be back to his second job at 5:30." Also, she wonders why the supervisor is so upset because 10 minutes is very little time out of eight hours. How would you reply if you were the supervisor?

SWITCHBOARD OPERATOR

SUGGESTED STUDENT RESPONSES

1. Depends on type of friendship. If the friendship is not close, the comment may be considered by Dolores as a threat from James. If the friendship is close, Dolores may welcome such a comment knowing that she will have to improve in this area.

2. Dolores should be reprimanded in private. It is in poor taste to embarrass someone in front of others. There may be remarks made which others should not hear. Employee morale is often destroyed when discretion is not used in this type of situation.

3. Tell Dolores that she has an obligation to her job. She is being paid to work until 5:00 p.m., not 4:50 p.m. She should arrange for someone else to pick her up if her boyfriend cannot wait any longer than 5:00 p.m. sharp. Indicate that 10 minutes per day adds up to 50 minutes per week or 42 hours per year, which is somewhat greater than a typical workweek. The loss of time is thus quite great, and the telephone company is certainly not getting its full share of labor for the money expended.

LEARNING ACTIVITY PACKAGE 25

Category: Office

Focus: Other Occupations with the Telephone Company

Activity: Game: What's My Line

Objective: At the conclusion of this lesson, the student will be able to identify the various positions associated with the telephone company as a result of participating in the classroom game, What's My Line.

EQUIPMENT, SUPPLIES, AND FORMS

1. Sample list of positions found with the telephone company (see sample enclosed in this learning package).

RATIONALE

The purpose of this game is to provide students with an awareness of many jobs that are available with the telephone company.

SUGGESTED PROCEDURE

Compile a list of jobs with the telephone company that your students are aware of or have studied. Use the sample list included with this learning package as a starting point.

Select one student to be the guest and four students to be the panel members. Provide the "guest" with one occupational title. Each panel member is entitled to four questions. The questions must be worded so that the "guest" may respond with a "yes" or "no" answer. If the occupation is not guessed, the panel does not receive points. If the correct occupation is named, the panel receives 10 points for each panel member who has not questioned the guest, i.e., if the third member of the panel correctly names the guest's occupation, the panel is given 10 points. Change the panel and guest for each occupation. Name the winning panel at the end of the game.

SAMPLE LISTING OF TELEPHONE COMPANY OCCUPATIONS

CLERICAL

Stenographer
Typist
Bookkeeper
Office Machine Operator
Computer Operator
Keypunch Operator
Cashier
Receptionist
File Clerk
Accounting Clerk
Auditing Clerk
Payroll Clerk

PROFESSIONAL

Engineer
Draftsman/woman
Accountant
Personnel and Labor Relations Worker
Public Relations Worker
Publicity Writer
Computer Systems Analyst
Computer Programmer
Lawyer

SALES AND MAINTENANCE

Business and Sales Representative
Stationary Engineer
Carpenter
Painter
Electrician
Plumber
Janitor
Watchman/woman
Guard

LEARNING ACTIVITY PACKAGE 26

Category: Office

Focus: Data Processing Job Opportunities

Activity: Speaker/Resource Person

Objective: At the conclusion of this lesson, the student will be able to describe on a student worksheet the job duties, educational requirements, salary ranges, advantages and disadvantages, and any additional information requested for jobs in data processing.

EQUIPMENT, SUPPLIES, AND FORMS

1. Resource Person Information Sheet (see sample in the back of this notebook).

RATIONALE

The purpose of this lesson is to make students aware of the opportunities available and the type of work done in the area of data processing. It provides students with an opportunity to meet and talk with someone dealing with data processing and to gain exposure not normally available from the classroom teacher.

SUGGESTED PROCEDURE

Have the resource person cover the different jobs available in data processing, discussing what each person does, the educational background or training needed, the pay, and the job opportunities projected for the future. Suggest that the person bring keypunch cards, printouts, etc., to display to the students.

The students should be aware of the methods for interviewing and have some suggested questions to ask the resource person. (See Teacher's Guide)

ALTERNATE ACTIVITIES

1. "Listen to Learn" cassette series, Data Processing Careers, Eye Gate House, 146-01 Archer Avenue, Jamaica, NY 11435.

2. Data Processing Clerk, filmstrip and cassette tape, Eye Gate House, 146-01 Archer Avenue, Jamaica, NY 11435.

3. Listen to oral reports or tape recordings made by students assigned to make appointments and interview people working in data processing occupations. The interviewing should be done on the students' own time.

LEARNING ACTIVITY PACKAGE 27

Category: Office

Focus: Systems Analyst/Programmer/Keypunch Operator

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to demonstrate an awareness of the systems analyst, programmer, and keypunch operator jobs by classroom discussion and completion of the student exercise, Keypunch Operator, with 90% accuracy.

EQUIPMENT, SUPPLIES, AND FORMS

1. Occupational Outlook Handbook.
2. Student exercises: Keypunch Operator, The Mechanical Human (Programmers) (see samples enclosed in this learning package).

RATIONALE

The purpose of this lesson is to expose students to data processing, a field that offers many clerical specialists opportunities for young people.

SUGGESTED PROCEDURE

Discuss with the students what a systems analyst, programmer, and keypunch operator do, the training required, working conditions, employment outlooks, and earnings. Use the Occupational Outlook Handbook as a reference.

Ask the students if they have any personal knowledge of these jobs or others in the data processing area.

Using the keypunch operator exercise, have the students compare the two keypunch keyboards. The top keyboard is from a Univac 9000 series machine while the bottom one is an I.B.M. 29 keyboard. Point out that the alphabetical keyboard on each machine is the same as a typewriter keyboard and that a typing class will prepare a person for the keypunch job.

Study the punched cards. Point out the difference between a punch in the zone area (0, 11, and 12) and the numeric area (1 - 9). In order to punch an alphabetic letter, place a punch in the zone area as well as in the numeric area. This need not be done to punch a number.

A single punch in the numeric or zone 0 area stands for a number. The number punched depends on the location of the punch. For example, a punch in the 1 stands for the number "1."

Study the key and then decode the message punched in the card.

Using the blank card have the students code their own message to someone else in the class. Exchange marked cards and decode the message.

The use of actual keypunch cards will make the coding and decoding easier and more realistic. These cards can be obtained at any data processing center.

Using the student exercise, The Mechanical Human, have the students write out a program necessary for a student to write his/her name on the board. Test each student's program by reading the instructions one at a time and having the student perform the functions as instructed. Different programs can be developed for such activities as opening a door, tying a shoe, putting a book on the shelf, etc.

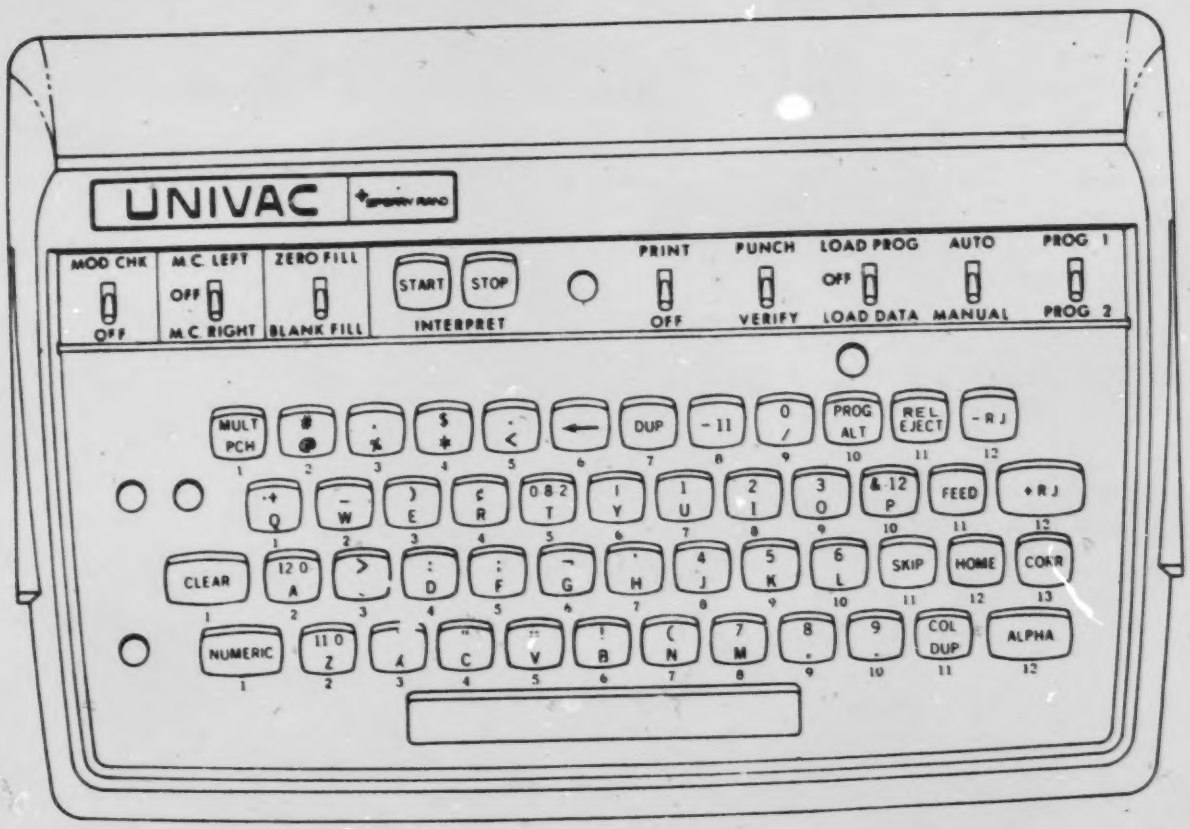
KEYPUNCH OPERATOR

A keypunch operator prepares cards to be fed into computers. The operation involves the use of a card-punch keyboard to record messages by means of punching holes at the proper position on the card. The result is that a message is punched in code; when the card is fed into a computer, the message is decoded.

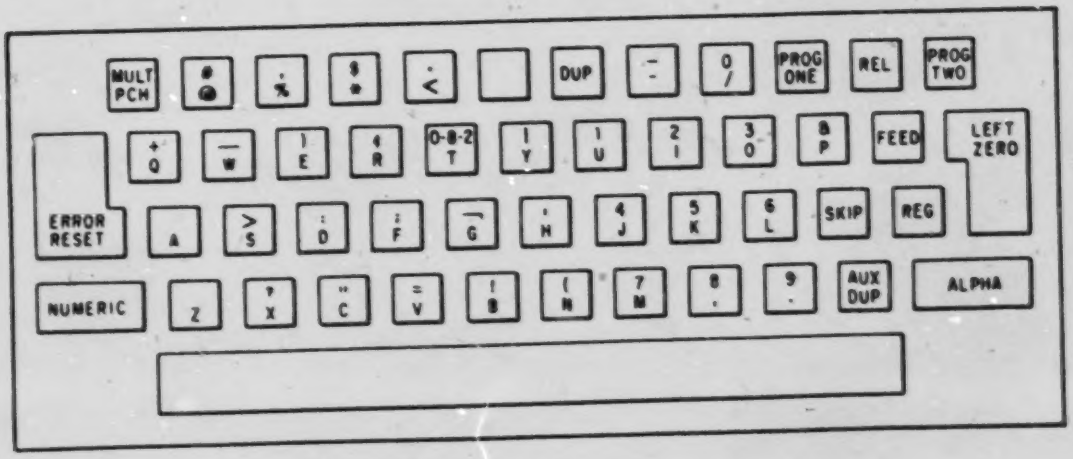
Directions:

See if you can decode a message punched in a card, and then code a message of your own. Follow these procedures:

1. View two kinds of card-punch keyboards.
2. Study the punched card.
3. Decode and write the message punched on the card.
4. Enter your own message on the card.



UNIVAC 9000 SERIES KEYBOARD



IBM 29 KEYBOARD

PUNCHED CARD

The above card is a duplication of a punched card. The black marks appearing in the Zone area and over the numbers in the numeric area represent holes punched by a keypunch machine.

The letters of the alphabet have been punched in this card. Notice that each letter has two positions: one in the zone area and one in the numeric area.

PUNCHED CARD

KEY TO LETTER CODE

Below is the code for each letter. See if you can associate each code with that punched in the card.

Letter	Zone	Row	Code
A	12	1	12-1
B	12	2	12-2
C	12	3	12-3
D	12	4	12-4
E	12	5	12-5
F	12	6	12-6
G	12	7	12-7
H	12	8	12-8
I	12	9	12-9
J	11	1	11-1
K	11	2	11-2
L	11	3	11-3
M	11	4	11-4
N	11	5	11-5
O	11	6	11-6
P	11	7	11-7
Q	11	8	11-8
R	11	9	11-9
S	0	2	0-2
T	0	3	0-3
U	0	4	0-4
V	0	5	0-5
W	0	6	0-6
X	0	7	0-7
Y	0	8	0-8
Z	0	9	0-9

PUNCHED CARD

CODED MESSAGE

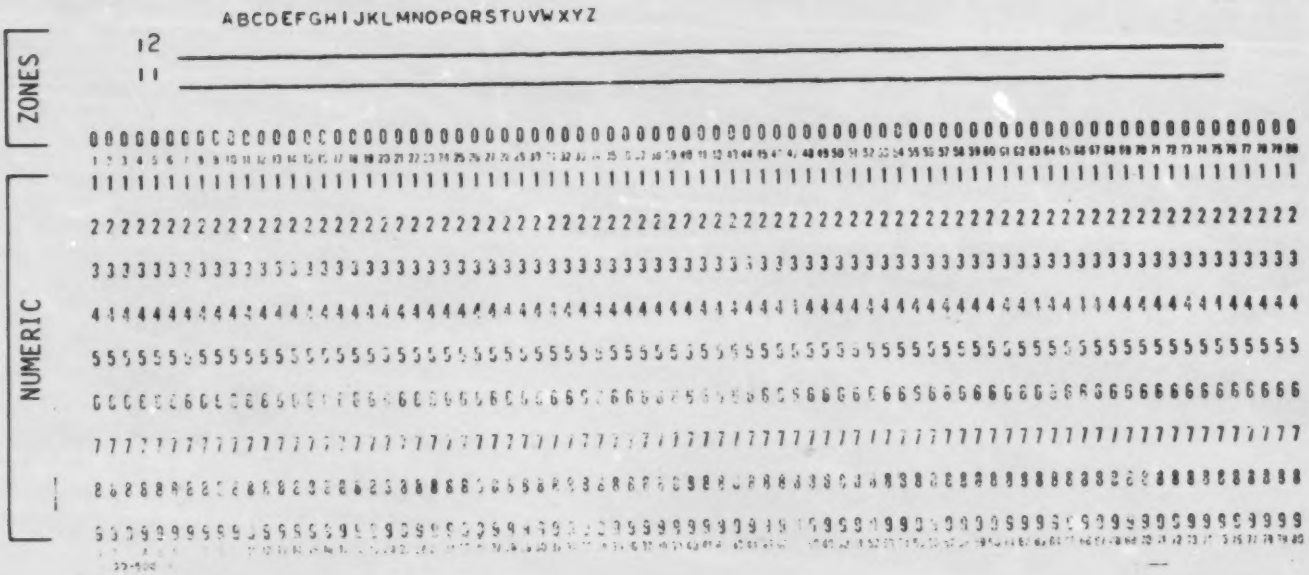
Directions: Above is a punched card that bears a coded message. Remember that the black marks represent holes punched by a keypunch machine. See if you can decode and write the message. If you need help, refer to the key. The first two letters have been decoded for you.

Code: 12-8 12-1 ____ ____ ____ ____ ____ ____ ____

____ ____ ____ ____ ____ ____

Letter: H A ____ ____ ____ ____ ____ ____ ____

____ ____ ____ ____ ____ ____



MY CODED MESSAGE

Directions: Transfer your personal message onto the card above. Exchange cards with a friend and decode their message.

ANSWER KEY TO CODED MESSAGE

Code:	12-8	12-1	0-5	12-5	12-1	11-5	12-9	12-3	12-5	0-2	0-4	11-4	11-4	12-5	11-9
Letter:	H	A	V	E	A	N	I	C	E	S	U	M	M	E	R

THE MECHANICAL HUMAN (Programmers)

Directions:

Write out instructions that are necessary for a student to move from his/her chair in the classroom to the blackboard where he/she will write his/her name and then return to his/her chair. Assume that the chair faces the blackboard with no obstacles between the chair and the blackboard. Also, assume that the student has a piece of chalk in writing hand. Other assumptions are:

1. The student does nothing unless he/she is given a specific instruction, e.g., "Stand Up."

2. The student's abilities are restricted to carrying out a limited repertoire of instructions, all of which involve physical movement only.

3. The student can only carry out such instructions one at a time.

4. These are the only instructions that the student understands:

   a) Stand Up (into erect position, without moving feet).

   b) Sit Down (into sitting position, without moving feet).

   c) Take One Step (forward only; steps are always a fixed length, can be done if student is standing up).

   d) Raise Writing Arm (into one fixed position--straight out in front of him/her).

   e) Lower Writing Arm (into one fixed position, straight down at his/her side).

   f) Turn Right (in place, without taking a step).

   g) Pick Up Item.

   h) Write One Letter On Board.

   i) Bend Writing Arm at Elbow.

   j) Straighten Writing Arm.

LEARNING ACTIVITY PACKAGE 28

Category: Office

Focus: Keypunch Operator

Activity: Field Trip: Data Processing Center

Objective: At the conclusion of this lesson, the student will have experienced the operation of a keypunch machine and will be able to demonstrate through completion of a Field Trip Observation Form a knowledge of the skills, requirements, and the general working conditions.

EQUIPMENT, SUPPLIES, AND FORMS

1. Field Trip Observation Form (see sample in the back of this notebook).

2. Photographs and descriptions of keypunch equipment; punched cards (obtain from local computer-manufacturing company office).

RATIONALE

The purpose of this activity is to allow students an opportunity to visualize and obtain hands-on experience of the job of keypunch operator. They will be able to discuss jobs in data processing after having seen and used the equipment.

SUGGESTED PROCEDURE

Determine beforehand what is available in your area in the way of data processing equipment.

Try to schedule the field trip at a location that is well equipped and can offer a wide variety of hands-on experiences. Have the person in charge explain the operation of each piece of equipment and allow the students to operate it. Be sure that each student is allowed to operate the keypunch machine. If a printer is available, have the students run off the cards that they have punched.

ALTERNATE ACTIVITY

Obtain photographs of the various equipment used to keypunch from a local computer-manufacturing company office. Also obtain copies of punched cards (or use samples in LAP 27). Explain, with the help of information you also obtain from the company, how each piece of equipment is used. Then give the students some data and ask them to write a description of the steps necessary to keypunch the data (have them include the functions of each piece of equipment).

LEARNING ACTIVITY PACKAGE 29

Category: General

Focus: Personal Evaluation

Activity: Student Exercises

Objective: At the conclusion of this lesson, the student will have demonstrated by completing the worksheets, how he/she feels about his/her communication abilities in relation to a business, marketing, and management career.

EQUIPMENT, SUPPLIES, AND FORMS

1. Do I Have the Desired Personality Traits? (see sample enclosed in this learning package).
2. Do I Have the Right Attitudes? (see sample enclosed in this learning package).
3. How Do I Rate My Ability to Communicate? (see sample enclosed in this learning package).
4. Rating Sheet (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to make students aware of their personality, ability to communicate, and attitudes as they relate to a career in business, marketing and management.

SUGGESTED PROCEDURE

Hand out the following forms:

Do I Have the Desired Personality Traits?
Do I Have the Right Attitudes?
How Do I Rate My Ability to Communicate?

Ask the students to complete the above forms, keeping in mind one or more specific business, marketing or management careers they have seen, read about, or researched. Instruct them to write the job title or titles along with their name on each sheet.

Each student is to evaluate his/her own personality, attitudes, and ability to communicate as these relate to the business, marketing and management career he/she has selected. Hand out the rating sheet and instruct the students to select those traits which they feel are important to success for the particular business, marketing and management career that they selected.

If the student honestly completes the worksheets, it should give an indication of the student's feeling about himself/herself. The rating sheet should indicate to the student that nearly all of these traits are important and desirable.

DO I HAVE THE DESIRED PERSONALITY TRAITS?

Name_____ Job Title(s)_____

Here are some traits without which—even though you may have ability, brains, skill, and information—you can hardly expect to succeed in competition with other people. Grade yourself using this scale:

Excellent	5 points
Good	4 points
Average	3 points
Fair	2 points
Poor	1 point

Those traits in which you score 3 points or below are the ones which you should improve.

_____ 1. I AM SOCIABLE: I get along with people and have a sense of humor.

_____ 2. I AM COURTEOUS: I am considerate of other people, give extra service, and say "Please" and "Thank You."

_____ 3. I AM COOPERATIVE: I work well with other people and am willing to assume responsibility.

_____ 4. I HAVE INITIATIVE: I make good use of my time, think up new ideas, and make suggestions for improvements.

_____ 5. I AM AMBITIOUS: I want to succeed, want to see others succeed, and am a "doer," not a "dreamer."

_____ 6. I AM TACTFUL: I say the right thing at the right time and do not argue without good reason.

_____ 7. I AM ENTHUSIASTIC: I am not afraid of hard work. I like people and my job.

_____ 8. I AM CONSIDERATE: I make an effort to see the other person's point of view, and I am always on the alert to help others.

_____ 9. I AM ORDERLY: I systematize my work. I keep things in their proper place and am a clean storekeeper.

_____10. I AM HONEST: I keep "secrets" in highest confidence, take responsibility for my own errors, avoid temptation, bad company, and bad personal habits.

DO I HAVE THE DESIRED PERSONALITY TRAITS? (CONT'D)

_____ 11. I HAVE SELF-CONFIDENCE: I believe I can and will succeed though I do not "know it all."

_____ 12. I AM LOYAL: I believe in the people I work with and I know people who are qualified will be rewarded.

_____ 13. I AM ADAPTABLE: I make adjustments easily and I welcome positive changes. I judge new ideas on worth rather than by prejudices.

_____ 14. I USE GOOD JUDGEMENT: I base judgement on facts, make decisions on merit, and I am noted for sound judgement.

_____ 15. I HAVE PERSISTENCE AND PATIENCE: I do not lose patience easily; I am not easily discouraged.

DO I HAVE THE RIGHT ATTITUDES?

Name_____Job Title(s)_____

Here are some attitudes which are desirable for jobs in business, marketing, and management. Without these traits—even though you may have ability, brains, and skill—you can hardly expect to succeed in competition with other people. Grade yourself on the following attitudes. Those on which you score 3 points or below are the ones which you need to improve.

Excellent	5 points
Good	4 points
Average	3 points
Fair	2 points
Poor	1 point

_____ 1. I get along with others (maintain harmonious working relationships with others in class).

_____ 2. I produce good-quality, accurate work.

_____ 3. I am dependable (complete assigned duties).

_____ 4. I plan and organize work well.

_____ 5. I produce a good quantity of acceptable work.

_____ 6. I exercise initiative (act on my own responsibility in the absence of supervision).

_____ 7. I have a good attitude (show interest and enthusiasm in work).

_____ 8. I am punctual and regular in attendance.

_____ 9. I am cooperative (am willing and eager to work with friends and teachers).

_____10. I am well informed concerning job duties and responsibilities.

_____11. I exercise good judgement (make sound decisions and evaluate ideas on their worth rather than by prejudice).

_____12. I exercise care in the use of equipment (respect property and follow safety regulations).

_____13. I make a good appearance (am neat and clean and dressed in good taste).

_____14. I am able to communicate (keep others informed).

_____15. I am loyal (keep confidential information).

_____16. I am ambitious (want to succeed).

HOW DO I RATE MY ABILITY TO COMMUNICATE?

Name_____ Job Title(s)_____

Your ability to communicate is important in business, marketing, and management occupations. It is a two-way street—you have to be able to make the other person understand what you want to say and to be able to listen carefully so that you can understand what he/she is saying. It is important that you express yourself clearly in writing and read and understand letters, instructions, and other written materials. Grade yourself on the following communication skills. Those on which you score 3 points or below are the ones which you need to improve.

Excellent	5 points
Good	4 points
Average	3 points
Fair	2 points
Poor	1 point

_____1. I have a pleasant speaking voice (pitched neither too low nor too high).

_____2. I speak at a moderate rate (neither too fast nor too slow).

_____3. I speak loudly enough so that I can be heard comfortably.

_____4. I avoid speaking in an affected, overly dramatic manner.

_____5. I avoid saying "er" and "you know" too often.

_____6. I pronounce each word correctly and clearly.

_____7. I write and speak in complete sentences.

_____8. I speak and write so that the predicate agrees with the subject.

_____9. I punctuate so that the meaning of the sentence is clear.

_____10. I limit my slang.

_____11. I understand that the use of profanity is offensive to many people.

_____12. I know how to organize my thoughts so that I can write or speak in a logical manner.

_____13. I do not interrupt others while they are speaking.

_____14. I listen to what the other person is saying, instead of planning what I am going to say next.

_____15. I know when I have said enough.

RATING SHEET

BUSINESS, MARKETING AND MANAGEMENT CAREER

Career Selected_____

In each category—personality, attitude, and ability to communicate—do you possess the traits that you feel are desirable for success in the business, marketing, and management career that you have selected? Using the three worksheets that you have completed, rate yourself by circling (Y) for "yes, this trait is important for the job," (N) for "no, this trait is not important," or (DA) for "does not apply."

PERSONALITY	ATTITUDE	COMMUNICATION
1. Y N DA	1. Y N DA	1. Y N DA
2. Y N DA	2. Y N DA	2. Y N DA
3. Y N DA	3. Y N DA	3. Y N DA
4. Y N DA	4. Y N DA	4. Y N DA
5. Y N DA	5. Y N DA	5. Y N DA
6. Y N DA	6. Y N DA	6. Y N DA
7. Y N DA	7. Y N DA	7. Y N DA
8. Y N DA	8. Y N DA	8. Y N DA
9. Y N DA	9. Y N DA	9. Y N DA
10. Y N DA	10. Y N DA	10. Y N DA
11. Y N DA	11. Y N DA	11. Y N DA
12. Y N DA	12. Y N DA	12. Y N DA
13. Y N DA	13. Y N DA	13. Y N DA
14. Y N DA	14. Y N DA	14. Y N DA
15. Y N DA	15. Y N DA	15. Y N DA
	16. Y N DA	

For each (Y), or yes, that you circle, determine the number of points that you assigned to this trait. Do you rate good or excellent in most of the desirable traits for this job? If not, you may need to improve these traits or select a career which is closer to your traits.

LEARNING ACTIVITY PACKAGE 30

Category: General

Focus: Course Sequences for Business, Marketing and Management Careers

Activity: Discussion/Student Exercise

Objective: At the conclusion of this lesson, the student will be able to identify the educational and training courses for occupations in the business, marketing and management cluster that are available in his/her high school and will demonstrate this by completing a suggested course sequence form.

EQUIPMENT, SUPPLIES, AND FORMS

1. Suggested Course Sequences For Business Careers (see sample enclosed in this learning package).

2. Suggested Guidelines for the Planning of Sequential Programs at the Secondary Level (Bulletin No. 52-175)
Available from: Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777.

RATIONALE

This lesson is designed to make students aware of the courses that your school offers to prepare them for a position in business, marketing and management careers.

SUGGESTED PROCEDURE

One of the objectives of career orientation is to enable the students to identify the educational and training requirements for occupations in the business, marketing and management cluster. There are two phases of the educational and training requirements which students should be able to identify:

1. Educational and training experiences in the high school.
2. Post-high school educational and training experiences which are required for specific business occupations.

High School Experiences. The following suggestions should assist students in understanding the specific high school experiences which will help them prepare for selected business occupations, using the bulletin Suggested Guidelines for the Planning of Sequential Programs at the Secondary Level.

Prepare a bulletin board which illustrates the sequence of high school courses for the major areas of work in business: Sales, Marketing, Accounting, Clerical, Secretarial, and Business Data Processing.

Prepare copies of your school's course offerings and descriptions in the business area for each student. Using the list and descriptions of business courses, discuss the content of each course keeping in mind which business careers might be beneficial for particular class members.

After discussing each course, have the students complete the Suggested Course Sequence for Business Careers form from the list of courses available in their school.

Post-High School. Students should also realize that additional education and training may be necessary for many business occupations. This should be explained in terms of specific post-high school educational and training experiences. Other qualifications and requirements beyond a high school education should be identified.

Examples of post-high school education and training which you may want to have the students identify are: private business schools, junior college programs, adult education classes, four-year colleges and universities, and graduate degree programs.

Student Handout

SUGGESTED SECONDARY-LEVEL COURSE SEQUENCES FOR BUSINESS CAREERS

BUSINESS CAREERS	SEQUENCE OF COURSES			
	OCCUPATIONAL ORIENTATION		OCCUPATIONAL TRAINING	
	NINTH GRADE	TENTH GRADE	ELEVENTH GRADE	TWELFTH GRADE
ACCOUNTING				
DISTRIBUTIVE MARKETING				
CLERICAL				

SUGGESTED SECONDARY-LEVEL COURSE SEQUENCES FOR BUSINESS CAREERS (CONT'D)

Student Handout

BUSINESS CAREERS	SEQUENCE OF COURSES			
	OCCUPATIONAL ORIENTATION		OCCUPATIONAL TRAINING	
	NINTH GRADE	TENTH GRADE	ELEVENTH GRADE	TWELFTH GRADE
SECRETARIAL				
BUSINESS DATA PROCESSING 1. Keypunch Operator 2. Computer Operator 3. Computer Programmer				
OTHER				

LEARNING ACTIVITY PACKAGE 31

Category: General

Focus: Conclusion of Business, Marketing and Management Cluster

Activity: Presentation of Oral and Written Report/Student Evaluation of Cluster

Objective: At the conclusion of this lesson, the student will prepare a written career report and report orally his/her findings to the class and will evaluate the cluster through the use of an evaluation form.

EQUIPMENT, SUPPLIES, AND FORMS

1. Business, Marketing and Management Research Evaluation Form (see sample enclosed in this learning package).

2. Evaluation Form (see sample enclosed in this learning package).

RATIONALE

The purpose of this lesson is to have students give an oral report based on the facts they have included in their written reports, and to allow each student to evaluate the cluster.

SUGGESTED PROCEDURE

Each student is to complete the Business, Marketing and Management Research Evaluation form for the particular job they researched. This form describes the references used, if anyone was interviewed, what the student found interesting, why the job was selected, and if the student would make a career out of the job he/she researched.

After completing this form, each student is to give an oral report, using as a guide the evaluation form as well as other information about the job. You may want to use the form to evaluate the work done on the research paper.

Be sure you allow the students to evaluate the cluster. Their evaluation will give you some idea as to changes you may wish to make in the business, marketing and management cluster to fit your students' needs. The research evaluation will also give you an idea of the jobs the students found interesting, and you may wish to change the jobs on which you concentrate.

BUSINESS, MARKETING AND MANAGEMENT RESEARCH EVALUATION

NAME_____ DATE_____

JOB_____

Reference Used:

Person(s) Interviewed:

How much time did you spend: Researching?_____

Writing?_____

List five interesting facts learned about this job.

1.

2.

3.

4.

5.

Why did you select this particular job to research?

What are your conclusions as to your making a career of this particular job?

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS CLUSTER

EVALUATION

List those activities in the cluster that you found to be:

Most Interesting	Least Interesting

List those parts of the cluster you would change and what you would do in their place.

Change	Do Instead

Use the back side to comment on this cluster.

RESOURCE PERSON INFORMATION SHEET

Resource Person: _____ Date: _____

Occupational Area: _____ Your Name: _____

NOTE TO STUDENT: You are required to complete one of these forms for every resource person visiting our class. In order to receive credit, be as thorough as possible.

1. List typical jobs within the occupational area:

2. Job responsibilities:

3. Working conditions:

4. Personality traits needed for occupational area:

5. Education and/or training required:

6. Advantages and disadvantages of occupational field:

7. Advancement opportunities in this occupational field:

8. Salary range (approximate starting to estimated maximum):

9. Your personal reaction to this occupational area as described by the speaker:

10. Describe your reaction to this speaker and make recommendations for improvement:

FIELD TRIP OBSERVATION FORM

Student Name _____

I. Job title _____

II. Description of major job duties (please list).

A. _____

B. _____

C. _____

D. _____

E. _____

III. Job characteristics. Check those which apply to a worker in this occupation.

___ A. Able to see physical results of work.
___ B. Competitive — must compete for advancement.
___ C. Directs activities of others — supervisory.
___ D. Helps people.
___ E. High level of responsibility.
___ F. Motivates others — must have ability to influence others.
___ G. Repetitious work.
___ H. Requires physical stamina.
___ I. Self-expression is encouraged.
___ J. Closely supervised by superiors.
___ K. Works with technical data.
___ L. Works with people.
___ M. Works alone.
___ N. Manual skills required.

IV. Educational requirements.

A. Check level required for this occupation.

___ 1. High school education desirable.
___ 2. High school education required.
___ 3. Community college.
___ 4. Four year college — baccalaureate.
___ 5. Advanced degree — masters.
___ 6. Advanced degree — doctorate.

B. Where can this education be obtained? Name one or two schools or industries where training is available (addresses, if available).

_____

_____

C. List the course or subject areas one would need to study for this job.

_____

_____

_____

_____

D. How many years of experience and what type of training is needed before entering this occupation?

_____

_____

_____

V. Employment opportunities.

A. List employers in your area who employ people for this job.

_____

_____

B. What starting wage or salary could one expect? _____

C. How are wages determined?

Union ___ Individual contract ___ Salary schedule ___

D. What position could a person advance to after experience is obtained?

_____

E. How much pay would you expect to receive in this advanced position? _____

F. What are some of the fringe benefits of this occupation?

_____

VI. Job requirements.

A. Is a license or union membership required? _____

B. What must a person do to qualify for this license or membership?

_____

C. Where can this license or membership be obtained?

_____

D. Is bonding necessary? _____

E. Are tools required? _____

F. Do employees buy uniforms? _____

VII. Working conditions. Check those which apply to this occupation.

___ A. Overtime required.
___ B. Outdoor work.
___ C. Indoor work.
___ D. Hazardous conditions (specify). _____
___ E. Variety of jobs.
___ F. Seasonal work.
___ G. Travel required.
___ H. Unusual working hours.
___ I. Dusty or noisy conditions.

VII. Where can additional information about this occupation be obtained?

_____

_____

_____

INTERVIEW QUESTIONS

The following is a list of questions which could be used when interviewing people about their occupation. This list is not complete and is intended to be used as a "helper" in thinking up other questions.

1. Why did you pick this job?
2. How did you get started in your occupation?
3. How did you choose your place of training?
4. What educational, training, and other qualifications are there for the job?
5. If you should wish to change jobs, would the training contribute in any way?
6. Do you think this job would have a good future for me?
7. How could I get started in this career?
8. What is the salary range of this occupation?
9. What could a beginning person expect to make?
10. What are the fringe benefits?
11. Do you get paid vacations?
12. Do you have medical insurance?
13. Is there any chance of being laid-off? If so, how many times a year?
14. What sort of planning does this business have for retirement?
15. What do you or don't you like about your job?
16. What are the advantages?
17. What are the disadvantages?
18. What are the hours and working conditions?
19. Do you ever have to work holidays? If so, which ones?
20. Do you ever work on weekends?
21. Is there a special uniform you must wear, or are you free to wear what you want? Does the company provide the uniform or does the employee?
22. What tools do you need?
23. Do you have to buy your own equipment?
24. What are the physical requirements?
25. What do you do in this occupation?
26. How much traveling is involved?
27. What kinds of people do you work with?
28. Is there any chance for advancement?

29. What are your responsibilities?
30. Do you belong to a union?
31. What's a typical day like for you in this job?
32. Is there any on-the-job training?
33. Has there ever been a time when you couldn't stand your job? If so, why and when?
34. Do you have to move if the company does?
35. What work experience did you have before you started to work in this occupation?
36. Who depends on your work? Upon whom do you depend?
37. Are there opportunities for advancement in this job? If so, what are the requirements for advancement?
38. How does your job affect your personal life?
39. What kinds of people do you meet?
40. Do you work mainly with people or things?
41. Do you work a lot with ideas?
42. Does your job offer opportunities to be creative?
43. Are people with your kinds of skills usually needed - even when business may be bad?
44. Is your work at all seasonal?
45. Could you briefly describe the personal qualities a person would need to do your job - strength, height, agility, ability to think rapidly, ability to make decisions, ability to deal with other people, etc.?
46. Would you recommend this kind of work for your children?
47. How do you spend your time after work?
48. If you could have any job in the world, what would you like to be?
49. Do you still go to school for special training?
50. When are people promoted? When are people fired?
51. Is bonding necessary?

OBSERVATION/INTERVIEW FORM

NOTE TO STUDENT: These experiences are to be completed outside of class. You will need to select several people to observe and interview about different jobs. Don't use the same people or jobs that were used for the questionnaires. Check with the teacher before doing the observation/interviews. Make an appointment with the person to be observed and interviewed. Don't just walk into a place and try to complete the assignment. In setting up the appointment, explain that you are doing this as a careers class assignment. Tell the worker that you will need to observe him/her working for 1/2 hour, then interview him/her briefly to complete the form. Ask what would be this person's best time. Do it at his/her convenience. While observing the worker you are recording what you observe in Part I - Observing. . . . Then on to the interview portion of the assignment.

YOUR NAME _____ COMPANY _____

DATE _____ NAME OF EMPLOYEE _____

OCCUPATION _____

PART I: INFORMATION GATHERED DURING OBSERVATION

1. Job responsibilities:

2. Working conditions:

3. Personality traits needed for this occupation:

4. How worker is treated by customers (if applicable):

5. How worker is treated by co-workers:

6. How worker is treated by supervisor:

7. Advantages and/or disadvantages of occupation you have observed:

8. Describe your likes/dislikes of occupation observed:

PART II: INFORMATION GATHERED DURING INTERVIEW

NOTE TO STUDENT: After observing the worker for 1/2 hour, take a few minutes to talk with him/her about the questions on Part II - Interviewing. Record the worker's responses accurately. When you have finished with the interview, get the worker's signature and date. Thank him/her, and you are finished. (You'll also need to sign this form.) Be sure to schedule the Observation/Interview so that it's at a good time in the worker's day.

1. Job responsibilities you have:

2. Working conditions of your job:

3. Personality traits you find helpful in your job:

4. How you are treated by your customers:

5. How you are treated by your co-workers:

6. How you are treated by your supervisor:

7. Advantages and/or disadvantages you can see in your job:

8. What do you like/dislike about your job?

Employee's Signature DATE: _____

_____

Company: Student Signature:

_____ _____

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

REFERENCES

BOOKS

Career Research Monographs, Institute of Research, Chicago, IL

Occupational Literature: Annotated Bibliography, H. W. Wilson Company, New York, NY 10459

Occupational Outlook Handbook, 1974-75 Editions, U.S. Department of Labor, Bureau of Labor Statistics. For sale by Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402

The Encyclopedia of Careers and Vocational Guidance, J.G. Ferguson Publishing Company, Chicago, IL 62221

Yellow Pages of Learning Resources, Group for Environmental Education, Inc., Philadelphia, PA 19107

PAMPHLET

Suggested Guidelines for the Sequential Programs at the Secondary Level (Bulletin No. 52-175), Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777

FILM AND FILMSTRIPS

Is A Sales Career For You?, Is A Career in Finance, Insurance or Real Estate For You?, Is A Career in Clerical Work For You?, Illinois Office of Education, East Central Curriculum Management Center, 100 North First Street, Springfield, IL 62777

Basic Office Machines, Data Processing Clerk, Data Processing Careers, Eye Gate House, 146-01 Archer Avenue, Jamaica, NY 11435

Operator (16-minute film), Illinois Bell Telephone Company, Public Relations Department, 406 East Monroe Street, Springfield, IL 62701

OTHER

Cumulative Career Index, Chronicle Guidance Publications, Inc., Moravia, NY 13118

Occupational Exploration Kit, Science Research Associates, Inc., 259 East Erie Street, Chicago, IL 60611

RESOURCES FOR BUSINESS,

MARKETING AND MANAGEMENT OCCUPATIONS CAREER INFORMATION

Accounting Careers Council
National Distribution Center
P.O. Box 650
Radio City Station
New York, NY 10019

Administrative Management Society
Publications Department
Willow Grove, PA 19090

Advertising Education Publications
3429 Fifty-fifth Street
Lubbock, TX 79413

Air Transport Association of America
1000 Connecticut Avenue, N. W.
Washington, DC 20036

American Advertising Federation
1225 Connecticut Avenue, N.W.
Washington, DC 20036

American Apparel Mfg. Assoc., Inc.
2000 K Street, N.W.
Washington, DC 20006

American Association of Adv. Agencies
200 Park Avenue
New York, NY 10017

American Institute of Cert. Pub. Accts.
666 Fifth Avenue
New York, NY 10019

American Management Association
Management Information Service
The American Management Assoc.
135 West 50th Street
New York, NY 10020

American Petroleum Institute
1271 Avenue of the Americas
New York, NY 10020

American Society for Personnel Adm.
52 East Bridge Street
Berea, OH 44017

American Trucking Association
1616 P Street, N.W.
Washington, DC 20036

American Woman's Society of
Certified Public Accountants
327 South LaSalle Street
Chicago, IL 60604

Association for Bank Audit,
Control and Operation
303 South Northwest Highway
Park Ridge, IL 60068

Association of National Advertisers
155 East 44th Street
New York, NY 10017

Banking Education Committee
The American Bankers Association
90 Park Avenue
New York, NY 10016

Business and Technical Personnel
Eastman Kodak Company
343 State Street
Rochester, NY 14650

Business Education Films
5113 Sixteenth Avenue
Brooklyn, NY 11204

Council on Opportunities in
Selling, Inc.
630 Third Avenue
New York, NY 10017

Data Processing Management Assoc.
524 Busse Highway
Park Ridge, IL 60068

Electronic Computer Programming
Institute
Empire State Building
New York, NY 10016

Financial Executives Institute
50 West 44th Street
New York, NY 10016

Friden, Inc.
2350 Washington Avenue
San Leandro, CA 94577

Institute of Life Insurance
277 Park Avenue
New York, NY 10017

Insurance Information Institute
Director of Educational Relations
100 Williams Street
New York, NY 10038

International Accountants Society
209 West Jackson Boulevard
Chicago, IL 60606

International Business Machines Corp.
Data Processing Division
1133 Westchester Avenue
White Plains, NY 10604

McGraw-Hill Book Company
Gregg Division
Manchester Road
Manchester, MO 63011

Merchandiser Film Productions
419 Park Avenue
New York, NY 10016

National Association of Accountants
919 Third Avenue
New York, NY 10022

National Association of Food Chains
1725 Eye Street, N.W.
Washington, DC 20006

National Association of Retail Grocers
360 North Michigan Avenue
Chicago, IL 60601

National Association of Wholesaler-Distributors
1725 K Street, N.W.
Washington, DC 20006

National Business Education Association
1201 Sixteenth Street, N.W.
Washington, DC 20006

National Consumer Finance Association
1000 Sixteenth Street, N.W.
Washington, DC 20036

National Office Products Association
740 Investment Building
Washington, DC 20005

National Secretaries Association
1103 Grand Avenue
Kansas City, MO

National Shorthand Reporters Association
25 West Main Street
Madison, WI 53703

National Society of Public Accountants
1717 Pennsylvania Avenue, N.W.
Washington, DC 20006

New York Life Insurance Co.
Career Information Service
Box 51
Madison Square Station
New York, NY 10010

Ohio State Council of Retail Merchants
71 East State Street
Columbus, OH 43215

Royal Office Typewriters
Division of Litton Industries
150 New Park Avenue
Hartford, CT 06106

Sales and Marketing Executives - International
630 Third Avenue
New York, NY 10017

Southwestern Publishing Company
West Chicago, IL

Stenograph
7300 Niles Center Road
Skokie, IL 60076

The American Bankers Association
Order Processing Department
1120 Connecticut Avenue, N.W.
Washington, DC 20036

United Business Schools Association
1730 M. Street, N.W.
Washington, DC 20036

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